

GOAL ACTION FORM – *SAMPLE*

This form documents an action plan and checklist for goal achievement.
The form can also be used during periodic reviews to measure actual progress made (plan vs. actual).

GOAL:	RATIONALE FOR THIS GOAL:
PLANNED ACTIVITIES: (Steps, Procedures, Assignments) 1. 2. 3. 4.	DEADLINES: 1. 2. 3. 4.
PROJECTED RESULTS (Success Indicators) <input type="checkbox"/> Immediate: <input type="checkbox"/> Long-Term:	
OBSTACLES/CONSTRAINTS:	
COSTS (Dollars, Time, Resources)	
PERSON RESPONSIBLE:	COMPLETION DATE:

COMPLETE GOAL ACTION FORM: 8 STEPS

◆ Goal

Enter the actual goal statement.. This statement contains S.M.A.R.T. goal elements: **Specific, Measurable, Achievable, Realistic, and Time-based.**

◆ Rationale for This Goal

This is the goal benefit. Opportunity Identification: it describes the importance of the goal to the mission as a guide to rationale. **If the goal type is:**

- ◆ **Essential:** Necessary for continued growth/progress of business or individual.
- ◆ **Problem-solving:** Proposes more appropriate/desired condition than current condition. Eliminates problems hindering growth, progress, creativity, improvement, etc.
- ◆ **Innovative:** Makes something good or satisfactory quantifiably better, faster, cheaper, easier, safer, etc.

Goal rationale also includes the W.I.I.F.M.” (What’s In It For Me?) Personal benefit to goal achievement (especially in business) is an important motivator ensuring success.

◆ Planned Activities (Steps/Procedures/Assignments)

Specific objectives to be met are a critical aspect of the action plan outlining specific and measurable steps to reach the goal, as well as methods to be used. It includes approaches (tactics) necessary to satisfy the needs for goal achievement and deadlines with a time limitation for completion of objectives and the goal.

◆ Projected Results (Success Indicators)

These are the long- and short-term expected results that indicate progress and/or completion of the objectives and the goal. These quantifiable elements provide a standard for comparison and milestones for measuring progress.

◆ Obstacles/Constraints

These are the potential physical, conditional and psychological obstacles that could block progress to the goal. The contingency plan and tactics necessary to overcome these obstacles should be detailed on an OBSTACLES WORKSHEET.

◆ **Cost (Dollars, Time, Resources)**

State the allowable expense for achieving the goal in dollars and resources to be used. This ensures that an acceptable return on investment exists for this goal.

◆ **Person Responsible**

This identifies who is responsible for achieving the goal. Many identify specific objectives, but only one individual can be held accountable for goal accomplishment.

◆ **Completion Date:** State the exact date and time for goal completion.

OBSTACLES WORKSHEET – SAMPLE	
Some OBSTACLES to goal achievement that are EXPECTED, PROBABLE, or LIKELY to occur are:	
OBSTACLE:	SOLUTION:
ACTIONS TO BE TAKEN TO IMPLEMENT SOLUTION:	
OBSTACLE:	SOLUTION:
ACTIONS TO BE TAKEN TO IMPLEMENT SOLUTION:	