

Successful teams are built on a foundation of clear, actionable goals that not only align with the organization's mission but also empower every team member to take ownership of their contributions. This tool provides a step-by-step framework to create goals that inspire collaboration, enhance accountability, and drive measurable results.

By using this tool, you'll be able to:

- **Clarify Team Objectives:** Define a shared purpose that aligns with your strategic goals.
- **Empower Individual Contributors:** Tailor objectives to reflect each team member's unique responsibilities and strengths.
- **Foster Collaboration:** Ensure alignment between individual and team goals to create a cohesive effort.
- **Track Progress Effectively:** Use SMARTER criteria and structured tracking to measure progress and celebrate success.

Whether you're leading a small team or managing a cross-functional group, this tool will help you streamline your goal-setting process and keep everyone on track toward collective success. Let's get started and make goal-setting an engaging, productive, and rewarding process for your team.

### Step 1: Define the Team Goal

Team goals provide a shared direction and purpose. Begin by identifying the overarching objective for your team:

**Team Goal Statement:** *What is the primary objective the team needs to achieve?*

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Example: "Increase sales revenue by 20% by the end of Q2."

### Step 2: Break It Down into Individual Goals

Aligned goals don't mean identical goals. Assign individual objectives that contribute to the team goal while reflecting each member's unique responsibilities.

**Individual Goal Template:**

- **Name:** \_\_\_\_\_
- **Goal:** \_\_\_\_\_
- **How it Supports the Team Goal:** \_\_\_\_\_
- **Deadline:** \_\_\_\_\_

Repeat for each team member:

Name	Individual Goal	Supports Team Goal By	Deadline
Example: Alex	Increase Midwest sales by 15%	Boosts regional revenue contribution	End of Q2
Example: Taylor	Generate 10 new leads per week	Expands sales pipeline	Ongoing
Example: Jordan	Close \$500,000 in new contracts	Contributes to total revenue target	End of Q2

### Step 3: Apply the SMARTER Framework

For each goal, ensure it meets the SMARTER criteria:

- **Specific:** Is the goal clear and precise?
- **Measurable:** How will success be measured?
- **Achievable:** Is the goal realistic given the resources available?
- **Relevant:** Does it align with the team's purpose and strategy?
- **Time-Bound:** What is the deadline?
- **Evaluate:** What checkpoints will you use to track progress?
- **Reward:** How will you celebrate success?

Use the space below to refine each goal:

#### SMARTER Goal Worksheet:

1. Specific: \_\_\_\_\_
2. Measurable: \_\_\_\_\_
3. Achievable: \_\_\_\_\_
4. Relevant: \_\_\_\_\_
5. Time-Bound: \_\_\_\_\_
6. Evaluate: \_\_\_\_\_
7. Reward: \_\_\_\_\_

### Step 4: Create a Goal-Tracking Plan

Use this table to monitor progress and accountability:

Name	Goal	Progress Checkpoints	Completion Status

### Step 5: Celebrate Team Achievements

Recognizing progress and success keeps your team motivated. Use this section to plan rewards for both individual and team milestones:

#### Team Reward Plan:

- Milestone: \_\_\_\_\_
- Reward: \_\_\_\_\_

#### Individual Reward Plan:

- Name: \_\_\_\_\_
- Milestone: \_\_\_\_\_
- Reward: \_\_\_\_\_

### Tips for Success

1. **Communicate Regularly:** Keep the team informed about progress and any adjustments to the plan.
2. **Stay Flexible:** Revisit goals as needed to reflect changes in priorities or circumstances.
3. **Focus on Growth:** Use goal setting as an opportunity for development, not just performance.

Let's make goal-setting a collaborative, engaging, and rewarding process for your team. Download this tool and use it to guide your next team planning session!

