Employee Goal Setting Worksheet

Write three to five goals for the period. For each one, fill in every column: if you cannot name the measure or the deadline, the goal is not ready yet. Review progress at each check-in and update the status. Status codes: On track, At risk, Off track, Done, Dropped (with reason).

EMPLOYEE AND PERIOD

Employee name

Job title

Manager

Goal period

☐ Quarter ☐ Half year ☐ Full year ☐ First 90 days

Period start

Period end

Team or department objective these goals support

GOAL 1

Goal statement (what will be achieved, by when)

Specific: what exactly will be different

Measurable: metric and current baseline

Target value

Achievable: resources, support or skills needed

Relevant: link to the team objective

Time-bound: deadline and milestones

Weight (% of total goals)

Status

☐ On track ☐ At risk ☐ Off track ☐ Done ☐ Dropped

GOAL 2

Goal statement

Metric, baseline and target

Support needed

Link to team objective

Deadline and milestones

Weight (%)

Status

☐ On track ☐ At risk ☐ Off track ☐ Done ☐ Dropped

GOAL 3

Goal statement

Metric, baseline and target

Support needed

Link to team objective

Deadline and milestones

Weight (%)

Status

☐ On track ☐ At risk ☐ Off track ☐ Done ☐ Dropped

DEVELOPMENT GOAL (OPTIONAL)

Skill or capability to build

How it will be built (training, project, mentoring)

How we will know it has improved

Target date

OKR LAYOUT (USE INSTEAD OF GOALS 1 TO 3 IF YOUR TEAM RUNS OKRS)

Objective (qualitative, what you want to achieve)

Key result 1 (metric from X to Y by date)

Key result 2

Key result 3

End-of-quarter score per key result (0.0 to 1.0)

CHECK-IN LOG

Check-in 1 date

Progress, blockers and changes agreed

Check-in 2 date

Progress, blockers and changes agreed

Final review date

Final result for each goal

AGREEMENT

Employee signature

Date

Manager signature

Date

Date agreed