



Yearly Goals Worksheet

BUSINESS GOALS

1. **Higher Goals.** Review the mission and your “WHY.” Keep as is or redefine.

Completed: Yes/No

2. **Tangible Production Goals.** Use office visits as your primary indicator. Determine your maximum capacity per week/month. Can you hit this by the end of the year and just cruise? If you are there now, what changes can you make to go beyond (new service, new doctor), or just new shirts and a new attitude?

Average in 2018 per month: _____ Goal for 2019 average per month: _____

By 1/1/2020 - Percent Achieved: 50 – 60 – 70 – 80 – 90 -- 100

PATIENT GOALS

1. **Higher Goals.** Define your complete finished outcome. What is the condition of someone who has achieved your best after they have completed all you have to offer.

Completed: Yes/No

2. **Tangible Goals.** What goals do you have to improve outcomes? You can use: Visit Average (Visits/New Patients) to show retention. You could use number of patients converting from Active Care (relief and corrective) to Maintenance/Wellness. Also, number of patients active on Wellness. You might use certain functional assessment scores. Keep it as simple as possible.

Goals for Improved Patient Outcomes: _____

By 1/1/2020 - Percent Achieved: 50 – 60 – 70 – 80 – 90 -- 100

What goals do you have to improve customer service? Same as above. Also..

Unsolicited testimonials

Homemade food dishes brought in for staff.

Goals for Improved Patient Services: _____

By 1/1/2020 - Percent Achieved: 50 – 60 – 70 – 80 – 90 -- 100



PROFESSIONAL GOALS

1. **Higher Goals.** Be an expert so I can... (complete): (For example, "My goal is to be an expert at the front desk so that I can deliver WOW service to all of our patients each day.")
2. **Tangible Goals:** Set goals for each team member to improve their knowledge and skills as a specialist in their individual role and also as a team member. This could include: number of hours in-office tough team training including practicing, rehearsing, and role playing; number of books read, webinars studied, and seminars attended. Must include report and presentation to other team members.

Goals:

- # Team training hours: _____
- # Books with team presentation: _____
- # of webinars with team presentation: _____
- # of seminars with team presentation: _____

Extra credit:

- Give a workshop to patients/members or a webinar to colleagues.
- Donate time to local charity in the name of your office.
(Optional: make team bonuses contingent upon a certain number of the above.)

By 1/1/2020 - Personal: Percent achieved professional goals: 50 – 60 – 70 – 80 – 90 -- 100

By 1/1/2020 - % of entire team achieved professional goals: 50 – 60 – 70 – 80 – 90 -- 100

PERSONAL GOALS

This is personal...and optional. But it should be a core value to **practice what you preach** – which is: **IMPROVEMENT**. So, how are you going to improve your life in 2019?

What are you (and each individual) going to do to improve personally? For example: fitness, hobbies, relationships, eliminate bad habits, improve good habits, etc.

Personal goals (list them)

By 1/1/2020 - Percent Achieved: 50 – 60 – 70 – 80 – 90 -- 100

QUARTERLY REVIEWS

Schedule review dates now. This is vital, essential, and mandatory.

Dates:

1st week of April : _____ 1st week of July : _____
1st week of October : _____ 1st week of January : _____

Review each quarter. On track? Good! Continue. Off the rails? Get back on.

Be true to your goals.