SMART Goal Worksheet

Name: _____ Date: _____

One goal per sheet. Answer each question, then combine the answers into one sentence.

1. The goal in plain words

2. Make it SMART

	Question	Your answer
S	**Specific** What exactly will change, and for whom?	
M	**Measurable** Which number proves it? Write the baseline and the target.	
A	**Achievable** What time, people and budget does it need? Do you have them?	
R	**Relevant** Which bigger goal or priority does this support?	
T	**Time-bound** Start date, deadline, and the day you will review progress.	

3. SMART goal statement

I will _____ from _____ to _____ by _____, by _____, reviewed every _____.

4. Action plan

Action	Owner	Due

5. Obstacles and support needed

6. Review rhythm

Review day: _____ Where the number comes from: _____ Status: On track / At risk / Off track

12-Week Review Log

Goal: _____

Baseline: _____ | Target: _____ | Start: _____ | Deadline: _____

Week	Week ending	Planned	Actual	Status	What worked / next action
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

Planned = baseline + (target - baseline) x week / 12. Status: On track if your current pace reaches the target by the deadline, At risk if it reaches at least 80% of the planned improvement, Off track if less. The Excel tracker does this math for you.

Weekly review questions

1. What is this week's number?
2. Is the pace on track for the deadline?
3. What blocked progress?
4. What is the one action for next week?

SMART Goal Worksheet: filled example

Fictional example: a six-person customer support team, January to March 2026. The same numbers appear in the Excel tracker's Example tab.

1. The goal in plain words

Make customers happier with support.

2. Make it SMART

	Question	Your answer
S	**Specific** What exactly will change, and for whom?	Raise the NPS of customers who contacted support, by fixing the two biggest drivers of detractor scores: slow follow-up and outdated help articles.
M	**Measurable** Which number proves it? Write the baseline and the target.	Support NPS, rolling 4-week survey score. Baseline 32, target 45 (+13 points).
A	**Achievable** What time, people and budget does it need? Do you have them?	Callbacks take about 6 team hours a week. Five help articles need one writer for three weeks. No new hires.
R	**Relevant** Which bigger goal or priority does this support?	Detractor comments in renewal calls point to support. This supports the company goal of improving renewals.
T	**Time-bound** Start date, deadline, and the day you will review progress.	Start January 5, 2026. Deadline March 29, 2026 (12 weeks). Review every Monday.

3. SMART goal statement

Raise our support NPS from 32 to 45 by March 29, 2026 by calling back every detractor within two business days and rewriting our five most-visited help articles, reviewed every Monday.

4. Action plan

Action	Owner	Due
Call back every detractor within 2 business days	Whole team	Weekly
Rewrite the 5 most-visited help articles	Writer on rotation	Mar 1, 2026
Route billing tickets to a specialist (added Feb 16)	Support lead	Feb 22, 2026

5. Obstacles and support needed

Survey volume is low (~40 responses a week), so one bad week moves the score. Support needed: one writer for three weeks.

6. Review rhythm

Every Monday, 15 minutes. Number from the survey tool's NPS report, logged in the tracker. Status: On track / At risk / Off track.

12-Week Review Log: filled example

Goal: Raise our support NPS from 32 to 45 by March 29, 2026 by calling back every detractor within two business days and rewriting our five most-visited help articles, reviewed every Monday.

Baseline: 32 | Target: 45 | Start: Jan 5, 2026 | Deadline: Mar 29, 2026

Week	Week ending	Planned	Actual	Status	What worked / next action
1	Jan 11	33.1	34	**On track**	Started detractor callbacks
2	Jan 18	34.2	35	**On track**	Callbacks on schedule
3	Jan 25	35.3	36	**On track**	First 2 help articles rewritten
4	Feb 1	36.3	37	**On track**	Help article 3 live
5	Feb 8	37.4	36	**Off track**	Billing email confused customers
6	Feb 15	38.5	37	**Off track**	Review: route billing tickets
7	Feb 22	39.6	39	**At risk**	Billing routing live
8	Mar 1	40.7	41	**On track**	All 5 help articles live
9	Mar 8	41.8	42	**On track**	No change to plan
10	Mar 15	42.8	43	**On track**	No change to plan
11	Mar 22	43.9	44	**On track**	1 point to go
12	Mar 29	45.0	46	**Achieved**	Goal achieved

Planned = baseline + (target - baseline) x week / 12. Status: On track if your current pace reaches the target by the deadline, At risk if it reaches at least 80% of the planned improvement, Off track if less. The Excel tracker does this math for you.

Weekly review questions

1. What is this week's number?
2. Is the pace on track for the deadline?
3. What blocked progress?
4. What is the one action for next week?