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SMART goal setting for employees

(Practice Name) uses the SMART framework to develop individual and team goals. Use this form to create an action plan to achieve a specific SMART goal.

As a reminder, SMART stands for:

- **Specific:** A goal should have concrete objectives that need to be achieved.
- **Measurable:** An employee should be able to use practical benchmarks to assess the progress towards the goal.
- **Attainable:** Employees must have adequate time, resources, and willingness to achieve the goal.
- **Realistic:** The goal must be stretching to improve skill set and still be achievable
- **Timely:** The completion of the goal should be beneficial to their job role or a specific upcoming event or project and should be achievable within a specific deadline.

Action Plan

Form completed by (Manager): _____

Date: _____

Employee or team responsible for completing the goal: _____

What is the action item? Be as detailed and specific as possible. (E.g., "increase recall bookings by 10 per week") The action item should reflect your SMART goal.

Why is it important to reach this goal? What are the expected outcomes of achieving this goal?

What steps will be taken to achieve the goal? List them in order of priority. Include a desired date of completion for each step. Check off each step as it is completed.

☐ (Include step)

Date to complete: _____

Employee responsible for task: _____

Resources required: _____

☐ (Include step)

Date to complete: _____

Employee responsible for task: _____

Resources required: _____

☐ (Include step)

Date to complete: _____

Employee responsible for task: _____

Resources required: _____

☐ (Include step)

Date to complete: _____

Employee responsible for task: _____

Resources required: _____

☐ (Include step)

Date to complete: _____

Employee responsible for task: _____

Resources required: _____

Are there any roadblocks or dependencies affecting the completion of the goal? How can these be resolved or remedied?

How will progress be measured? What systems, tools, or other resources will be used to assess the progress towards the goal?

Determine a few follow-up dates to hold meetings or discussions about the progress towards the goal and to assess roadblocks or other concerns. Document the proceedings of each meeting or discussion.

- (Insert date)
- (Insert date)
- (Insert date)

What is the due date for completing the goal? _____

How will you celebrate success?

This does not need to be expensive or take a lot of time. Acknowledging a job well done and offering congratulations can be powerful in allowing your staff to feel appreciated for their hard work.