

Practice Development Series

Module 1: Business Planning / Activity 3: Goal Setting: Business & Self-Improvement Goals

Aligned with the PFA™ Designation Program

Instructions: Complete the goal setting activity using the template that follows. Scroll down to ensure you see the full template. The sample goals can be used as your own, but then you must also include a minimum of 1-2 additional goals. As well, be sure to conduct a monthly review to track your progress and refine your goals.

Business Plan - Goal Setting as of _____(Date)		
Business Goals	Done By (Date)	Progress Review (Date)
1. Business Growth <ul style="list-style-type: none">• Growth goals for your practice• Timelines• Milestones		
2. Marketing Goals <ul style="list-style-type: none">• Products Offered• Promotional plans for your practice• E-marketing goals		
3. Operational Goals <ul style="list-style-type: none">• Office setup (i.e. hours of operation, space required, leases)• Technology support (i.e. equipment rentals, client management systems, service and support arrangements)• Staff planning (i.e. staff position, role description, training requirement)		



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Business Plan - Goal Setting as of _____ (Date)		
Business Goals	Done By (Date)	Progress Review (Date)
4.		
5.		
6.		
7.		
8.		
9.		
10.		



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Self-Improvement Goals	Done By (Date)	Progress Review (Date)
1. Knowledge		
2. Attitude		
3. Skills		
4. Habits		

