

Annual Planning & Goal-Setting Template

A simple framework for setting next year's priorities instead of winging it every January.

Step 1: Look Back Honestly

1. What worked well this year?
2. What didn't go as planned, and why?
3. What's one thing you'd do differently with what you know now?

Step 2: Set 3–5 Priorities, Not 15

PRIORITY	OWNER	SUCCESS MEASURE	TIMELINE

Step 3: Break It Down By Quarter

What needs to happen in Q1 for this priority to be on track by year-end? Don't leave big goals undefined until the deadline approaches.

Step 4: Build In Check-Ins

- ☐ Quarterly review scheduled in advance, not left to chance
- ☐ A simple way to track progress that doesn't require reconstructing everything from memory
- ☐ Willingness to adjust priorities if something changes mid-year

Common Planning Mistakes To Avoid

- ☐ Too many priorities, which really means no priorities
- ☐ Goals with no clear owner or measure of success
- ☐ A plan made once in January and never looked at again