Goal Setting for the New Year

**A Worksheet for Independent Pharmacies**

*This worksheet accompanies “*[Pharmacy Goal Setting for the New Year](https://www.pccarx.com/Blog/pharmacy-goal-setting-for-the-new-year)*,” an article published to* The PCCA Blog*.*

1. **Ask the question**, “Did we meet expectations this year, and if not, what were the barriers that prevented us from doing so?”
   1. List the expectations that fell short of your goals:
   2. List the activities you need to complete to meet the expectations:
   3. List the resources you need to rely on to meet the expectations:
   4. Determine what is required to tap into those resources:
   5. List an option to overcome each barrier and commit to completing that activity using the required resources:
2. Once you have listed those leftover goals, **begin identifying new goals** based on the current marketplace conditions. Try to set no more than five goals for the year:
   1. Goal 1:
   2. Goal 2:
   3. Goal 3:
   4. Goal 4:
   5. Goal 5:
3. Use the **SMART goal-setting approach** to ensure that your goals are most effective at improving your pharmacy. This means that you goals should be:
   1. **Specific**: State exactly what you want to accomplish (who, what, where, why)
   2. **Measurable**: How will you demonstrate and evaluate the extent to which the goal has been met?
   3. **Attainable**: Stretch and challenge your pharmacy, but the goals should be within your ability to achieve the desired outcome. And keep in mind — what is the action-oriented verb in the goal?
   4. **Relevant**: How does the goal tie into your key responsibilities? How is it aligned to the larger objectives of your pharmacy?
   5. **Time-bound**: Set one or more target dates, the “by when” to guide your goal to successful completion (include deadlines, dates and frequency)
4. **Make a list of the resources each goal will require** in order to be accomplished. Identify how and when each resource will be required and designate the staff person who will be responsible to access the resource.
   1. Goal 1
      1. Resources needed:
      2. Person responsible for accessing the resource:
   2. Goal 2
      1. Resources needed:
      2. Person responsible for accessing the resource:
   3. Goal 3
      1. Resources needed:
      2. Person responsible for accessing the resource:
   4. Goal 4
      1. Resources needed:
      2. Person responsible for accessing the resource:
   5. Goal 5
      1. Resources needed:
      2. Person responsible for accessing the resource:
5. **Develop a timeline for each goal.** I suggest you allocate two to three months to achieve each goal, with a target of accomplishing all goals by the end of the year.
   1. Goal 1 deadline:
   2. Goal 2 deadline:
   3. Goal 3 deadline:
   4. Goal 4 deadline:
   5. Goal 5 deadline:

**Bringing It All Together**

Copy your responses from above onto the next page, then print and display it in your pharmacy to hold yourself and your staff accountable for these annual goals. We’ve filled out the first goal as an example for you.

[Insert Pharmacy Name]’s 2021 SMART Goals

**Goal 1:** Implement a patient follow-up program to build better relationships with our patients and their doctors.

* Required Resources: [PCCA’s blog post on patient follow-up programs](https://www.pccarx.com/Blog/3-myths-about-patient-follow-up-programs); tracking/reminder system; SOP for logging feedback; training manual/script for phone staff
* Led by: Jane Smith, Pharmacy Owner
* Achieve by: June 30, 2021

**Goal 2:**

* Required Resources:
* Led by:
* Achieve by:

**Goal 3:**

* Required Resources:
* Led by:
* Achieve by:

**Goal 4:**

* Required Resources:
* Led by:
* Achieve by:

**Goal 5:**

* Required Resources:
* Led by:
* Achieve by: