



January Strategic Planning & Goal Setting Worksheet

Use this worksheet to clarify priorities, set measurable goals, and align your team for the year ahead. This tool is designed for small businesses, large organizations, and nonprofits.

Step 1: Reflect on the Past Year

Answer the questions below honestly. Reflection creates clarity.

- What were our biggest wins last year?
- What challenges or obstacles slowed our progress?
- Which efforts delivered the greatest return on time or investment?
- What activities felt misaligned or unnecessary?

Step 2: Identify Your Top Three Priorities

List the three priorities that will have the greatest impact on your organization this year. Fewer priorities create stronger focus.

Priority 1: _____

Priority 2: _____

Priority 3: _____

Step 3: Turn Priorities into Measurable Goals

For each priority, define what success looks like. Be specific and measurable.

Priority 1 Goal:

• Metric (How will you measure success?): _____

• Target Date: _____

Priority 2 Goal:

• Metric (How will you measure success?): _____

• Target Date: _____

Priority 3 Goal:

• Metric (How will you measure success?): _____

• Target Date: _____

Step 4: Assign Ownership & Resources

Goals move forward when responsibility is clear.

Priority 1 Owner/Team: _____

Key Resources or Support Needed: _____

Priority 2 Owner/Team: _____

Key Resources or Support Needed: _____

Priority 3 Owner/Team: _____

Key Resources or Support Needed: _____

Step 5: Schedule Accountability Check-Ins

Decide how often you will review progress and make adjustments.

- How often will we review progress? (Monthly / Quarterly)
- Who needs to be involved in these check-ins?
- How will updates be communicated?

Leverage Your Chamber Resources

Your Chamber is a strategic partner in your success. Use Chamber networking events, professional development opportunities, peer roundtables, and committees to gain insight, accountability, and connections that support your goals throughout the year.

We encourage you to revisit this worksheet regularly and engage with your Chamber to keep your plan active and relevant.