Annual Goal Setting Agenda

Ideal Format: Team Retreat
Length: Half – Full Day
Preparation:
  Written Agenda
  Flip Chart, Markers
  Key Indicators of Practice Growth

Agenda:

   a. Where did the practice grow?
   b. How did the office improve efficiency, communications, volume, profit,…. Other?

   a. Measurable strengths? Positive Growth?
   b. Which indicators would you like to influence for 2006? Any plateaus, lower growth than previously anticipated, new growth opportunities?


4. Prioritize ideas, time line, assign individuals or partners and target dates to evaluate progress.

5. Establish goals for your office key indicators to measure progress.

6. Determine future team meetings to monitor progress.