



Annual Career Goal Planner Worksheet

What the Tool Is Used For

This worksheet helps employees set, track, and reflect on meaningful career goals for the year. It encourages intentional planning across performance, learning, visibility, and personal growth—ensuring that professional development stays aligned with personal vision and organisational opportunities.

Why and When to Utilise the Tool

Use this tool:

- At the start of a new calendar or financial year
- During annual reviews or development planning
- After career clarity work (e.g. vision/mission exercises)
- When setting goals for a promotion, lateral move, or upskilling effort

This tool helps employees stay focused and proactive throughout the year.

Expected Results

By using this tool, employees can:

- Clarify 3–5 meaningful goals for the year ahead
- Break large ambitions into manageable, quarterly steps
- Align goals with their vision, performance expectations, and learning needs
- Stay accountable through quarterly reviews and adjustments

Example Use Cases

Example 1

Problem: Jasmine wanted a team lead promotion but hadn't made her development visible.

Action: She used the planner to set goals around leading a cross-functional project, mentoring juniors, and requesting monthly feedback.

Result: She tracked progress quarterly and presented it during her mid-year and annual review. She was promoted in December.

✔ **Example 2**

Problem: Liam was losing motivation in his support role and unsure how to progress.

Action: His planner focused on upskilling (Excel, Power BI), improving time management, and increasing collaboration with senior analysts.

Result: He completed two certifications, earned recognition from leadership, and transitioned to a business analyst role within the same company.

📄 **Annual Career Goal Planner Worksheet**

📅 **Step 1: Identify 3–5 Career Goals for the Year**

Goal Area	SMART Goal Statement	Why This Matters
Performance		
Learning & Development		
Visibility / Influence		
Wellbeing / Balance		
Strategic Growth		

17 Step 2: Break Each Goal into Quarterly Milestones

Example: Goal – Complete Data Analytics Certification by Year-End

- **Q1:** Research providers and enrol
- **Q2:** Complete first two modules
- **Q3:** Complete remaining modules
- **Q4:** Submit final assessment and update CV

Create your own milestones per goal.

Quarter 1:

Quarter 2:

Quarter 3:

Quarter 4:

Step 3: Quarterly Check-Ins

Use this section every 3 months:

Quarter	What's Progressing Well?	What's Stalled or Changed?	What's One Next Step?
Q1			
Q2			
Q3			
Q4			

Potential Actions Based on Results

Insight	Suggested Action
Goals feel too broad or vague	Rewrite as SMART goals with clear deadlines
Falling behind on milestones	Reassess priorities, ask for support, or scale back
High motivation but little visibility	Share progress more regularly in team meetings or reviews
Skill development stalling	Book training, find a mentor, or join a learning challenge
Lack of growth opportunity	Explore internal career pathways or job rotations

Self-Reflection Section

1. Which goal excites me the most—and why?

2. What's one barrier I need to plan around?

3. Who can help me stay on track or provide feedback?

4. How will I celebrate hitting a milestone or completing a goal?
