



Women of Wellness

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GOAL-SETTING WORKSHEET

Lead with Well-Being: A Woman's Strategic Guide to Transforming Workplace Culture

Organization: _____ Completed by: _____

_____ Date: _____

PART 1: CREATING YOUR WELLNESS VISION

Our wellness vision describes the workplace we want to create. It should be aspirational yet grounded in our values.

What principles must anchor our wellness commitment? (Check all that apply)

Dignity Equity Compassion Sustainability

Inclusion Authenticity Trust Other: _____

Our Wellness Vision Statement (1-3 sentences):



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Who helped create this vision? (List stakeholders involved)

PART 2: SETTING SMART GOALS

Use the SMART framework: Specific, Measurable, Achievable, Relevant, Time-bound

MENTAL HEALTH & WELL-BEING

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____



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Achievable: What resources do we need? _____

Relevant: How does this support our business objectives? _____

Owner/Sponsor: _____ Team Lead: _____

WORK-LIFE INTEGRATION

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____

Achievable: What resources do we need? _____



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Relevant: How does this support our business objectives? _____

Owner/Sponsor: _____ Team Lead: _____

EQUITY & INCLUSION

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____

Achievable: What resources do we need? _____

Relevant: How does this support our business objectives? _____



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Owner/Sponsor: _____ Team Lead: _____

PHYSICAL HEALTH

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____

Achievable: What resources do we need? _____

Relevant: How does this support our business objectives? _____



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Owner/Sponsor: _____ Team Lead: _____

ENGAGEMENT & CULTURE

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____

Achievable: What resources do we need? _____

Relevant: How does this support our business objectives? _____

Owner/Sponsor: _____ Team Lead: _____



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FINANCIAL WELLNESS (Optional)

Specific Goal: _____

Measurable: What will we track? _____

Current Baseline: _____ Target: _____ By when: _____

Achievable: What resources do we need? _____

Relevant: How does this support our business objectives? _____

Owner/Sponsor: _____ Team Lead: _____



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PART 3: UNDERSTANDING INTERCONNECTION

Remember: These goals don't operate in isolation. They're an interconnected system.

How do your mental health goals support your work-life integration goals?

How do your equity goals support your engagement goals?

What happens if we achieve one goal but not others?

PART 4: LINKING TO BUSINESS OBJECTIVES

Our organization's top business priorities are:



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1. _____
2. _____
3. _____

How our wellness goals directly support these priorities:

Priority #1 is supported by these wellness goals: _____
because: _____

Priority #2 is supported by these wellness goals: _____
because: _____

Priority #3 is supported by these wellness goals: _____
because: _____

PART 5: MAKING THE ROI CASE



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Expected Return on Investment:

Financial Benefits We Expect:

- Reduced turnover (estimated savings: \$_____)
- Lower healthcare costs (estimated savings: \$_____)
- Decreased absenteeism (estimated savings: \$_____)
- Reduced disability claims (estimated savings: \$_____)
- Other: _____ (estimated savings: \$_____)

Total Estimated Annual Savings: \$_____

Non-Financial Benefits We Expect:

- Improved employee engagement
- Enhanced employer brand/reputation
- Increased innovation and creativity
- Stronger psychological safety
- Better customer satisfaction
- Improved diversity and inclusion
- Other: _____



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Investment Required:

Program costs: \$_____

Staff time: \$_____

Technology/tools: \$_____

Training: \$_____

Total Investment: \$_____

Estimated ROI: For every \$1 invested, we expect \$_____ in return

PART 6: TIMELINE MAPPING

Quick Wins (0-3 months):

1. _____
2. _____
3. _____



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Short-Term Goals (3-6 months):

1. _____
2. _____
3. _____

Medium-Term Goals (6-12 months):

1. _____
2. _____
3. _____

Long-Term Goals (12-24 months):

1. _____
2. _____
3. _____

PART 7: ACCOUNTABILITY STRUCTURE



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Leadership Commitment:

Executive Sponsor: _____ Role: _____

How will leadership demonstrate commitment?

- Public announcement of goals
- Personal participation in programs
- Wellness integrated into performance reviews
- Regular updates in leadership meetings
- Budget allocated
- Other: _____

Review Cadence:

Monthly check-ins: Led by: _____ Date: _____

Quarterly reviews: Led by: _____ Date: _____

Annual assessment: Led by: _____ Date: _____

How We'll Make Goals Visible:



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- Dashboard accessible to all employees
- Regular updates in all-hands meetings
- Progress shared in newsletters
- Celebrate wins publicly
- Other: _____

PART 8: EQUITY CHECKPOINT

For each goal above, ask:

Does this goal serve ALL employees equally? Yes No Not sure

If no or not sure, what specific populations might be underserved?

How will we ensure this goal reduces disparities rather than maintains them?



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What barriers might prevent different groups from benefiting equally?

How will we disaggregate data to track equity of outcomes?

By: Gender Race Caregiving status Department Role level

Other: _____

PART 9: COMMITMENT TO ACTION

I/We commit to:

Share these goals with all employees by: _____

Establish baseline metrics by: _____

Launch first initiative by: _____



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- Review progress monthly starting: _____
- Adjust based on data and feedback
- Celebrate progress along the way
- Remain flexible and willing to pivot when needed

Signatures:

Executive Sponsor: _____ Date: _____

Wellness Lead: _____ Date: _____

Other Key Stakeholders:

_____ Date: _____

_____ Date: _____



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REFLECTION QUESTIONS:

What excites you most about these goals?

What concerns you?

What support do you need to be successful?

How will achieving these goals transform your workplace culture?



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Resources & Support: Download additional templates at womenofwellness.love/lead-with-well-being-book

TIPS FOR USING THIS WORKSHEET:

- ✓ Complete this collaboratively with diverse stakeholders
- ✓ Don't set goals for the sake of having goals—base them on assessment data
- ✓ Fewer, meaningful goals are better than many superficial ones
- ✓ Make sure goals connect to business objectives (this gets buy-in)
- ✓ Build in accountability from the start
- ✓ Revisit and adjust quarterly—goals aren't set in stone
- ✓ Celebrate progress, even when you don't hit targets perfectly



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