

Goal Assessment: Personal, Professional, and Financial (“PPF”) Goals

Instructions for Leaders

These instructions accompany the goal assessment worksheet found at <https://optimizedoffice.com/ppf-goals>.

Personal, professional, and financial goal assessment and partnering is a powerful way to deepen relationships in the workplace. Done correctly, and with purpose, it will lead to greater benefit for all.

Benefits of PPF Goal Assessment & Partnership



Customize the worksheet linked at the top of this document and the instructions below for a quick roll-out. But be prepared to follow-up with your team and do the work to help set them up for success. Their answers should stimulate conversation among the team for areas where teammates can help one another. Secondly, there will be action items more appropriate for supervisor one-on-ones.

Instructions for employees completing the worksheet

These instructions may be given verbally (e.g., in a workshop) or cut and pasted into a separate document.

1. Think about ways that you could improve three areas of your life: Personal, professional, and financial. For example, perhaps you would like to take up a hobby (personal), join a toastmasters club (professional), or set aside savings for a trip (financial). **Think of at least two goals per category and write them in the “Goal” fields.**
2. Reflect on how your job impacts these goals. In the “opportunities” field jot down who or what boosts your ability to achieve your goals. Include opportunities for which you haven’t yet taken advantage.
3. Describe in the “obstacles” fields what work-related factor is holding you back from achieving each goal.

This is just one part of a larger process of redefining relationships in the workplace. The best results come from a careful assessment, strategic plan, and consistent follow up.

Get updates and receive related templates as they are released. Or book an exploratory chat for a quick assessment of your workplace and the best starting point for building partnerships in the workplace.

Start here: <https://optimizedoffice.com/ppf-goals>