

CUSTOMER EXPERIENCE

Goal Setting Worksheet

Step 1: Use customer and employee feedback from available sources (e.g., Veterans Signals (VSignals), All Employee Survey (AES), etc.) to create up to five improvement goals for your organization. Draft and finalize each goal as a team, using SMART criteria to make them specific, measurable, attainable, relevant, and timebound.

Setting Goals with SMART Criteria

S **Specific**—A clearly defined goal provides detail on what is to be done, who will do what, and where they will accomplish it. What do you want to accomplish? Define what you expect. Determine who will do it. Write with action verbs and plain language.

M **Measurable**—How will you know when you have accomplished your goal? Include specific quantities, dates, or other objective criteria to measure progress. For example, which customer feedback measures will you monitor during your goal?

A **Attainable**—Do you have a reasonable expectation of achieving your goal based on the measurable criteria and resources available (e.g., people, time, tools)? What is within your control or out of your control? Seek to challenge the team, while building in some acceptance of risks outside of their control.

R **Relevant**—Is the goal aligned to the strategic goals and objectives of VA and the unique role your organization plays within VA's larger mission? Ensure goals are aligned with broader organizational goals. Explain why the goal is worth the effort in terms of achieving the mission and vision.

T **Time-Bound**—Create a deadline for completion. By when will the goal be accomplished?

Step 2: In the spaces below, describe the alignment to the following priorities and necessary resources.

Why is this goal important?

What key stakeholders are required to achieve this goal?

What resources will this goal require?

How does this goal align with [VA Strategic Plan](#)?

How does this goal align with [CX Cookbook Domains](#)?

Final SMART Goal Development

Step 3: Complete your final SMART Goal.

Example: Patient Advocates, Service Line Advocates, or other designees will follow up with 100% of all Veterans who enter a Concern through a Veteran Signals survey within 72 hours of survey submission, conducting Service Recovery efforts or providing handoffs to other service areas, if required.

Looking for assistance with creating or achieving your goals? Visit [CX Consultation \(sharepoint.com\)](#).