

Client Goals & Milestones Template

Set SMART goals and track milestone achievements

CLIENT NAME

START DATE

REVIEW DATE

Primary Goal

WHAT DO YOU WANT TO ACHIEVE?

TARGET DATE

Specific

Measurable

Achievable

Relevant

Time-bound

Secondary Goals

GOAL #2

TARGET DATE

GOAL #3

TARGET DATE

Milestone Checkpoints

Done	Milestone	Target Date	Achieved	Notes
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Done	Milestone	Target Date	Achieved	Notes
<input type="checkbox"/>				
<input type="checkbox"/>				

Celebration / Reward Plan (How will you celebrate when goals are achieved?)

Goal Review & Adjustment

Review Date: _____

Progress Assessment

Goal Adjustments (if needed)