

Clinician Goal-Setting Template

Powered by PracticeVital

Name: _____ Date: _____

1. Review Last Year's Key Metrics & Set Goals for Next Year

Filter to last year in Key Metrics for last year's data

	Last Year	This Year Goal
Total Completed Sessions:		
Average Weekly Sessions:		
Utilization Rate		
Cancellation Rate:		
Retention Rate:		
Churn Rate:		

2. Set Caseload Goals for This Year

- Active Clients Needed: _____
Typically 1.8 to 2x the weekly session expectation
Ex. 20 sessions completed per week x 1.8 = 38 to 40 active clients needed
- Weekly Bookings Needed: _____
Based on average sessions needed per week, accounting for cancellation rate

3. Insights & Key Takeaways

What area(s) did you excel in most last year? *Look at areas in green*

What area(s) show the most room for improvement? *Look at areas in red and yellow*

What are your two primary areas you'd like to focus on for growth this year?

4. Build An Action Plan

Outline the action steps you can take to help you grow in your focus areas:

-
-
-
-

5. Set Your Next Check In

- **Monthly Check-In Date & Time:** _____ **with:** _____