

Practice Goal-Setting Template

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Practice Name: _____ Date: _____

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

For last year's data, use the Practice Dashboard & Completed Sessions Report, filtered to last year. For this year's goal setting, refer to the worksheet on page 2 to assist with the first two calculations.

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

2. 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*
Example: Retention rate, Churn rate, cancellations, overall utilization.

What are your 2-4 primary areas you'd like to focus on for growth this year?

GOAL SETTING WORKSHEET

Calculating Total Completed Sessions & Weekly Session Goals for 2026

A. Completed Sessions in 2024	(Pull from PV)	_____
B. Completed Sessions in 2025	(Pull from PV)	_____
C. % Change in 2025	$(B - A) / A * 100$	_____%
D. Desired % increase in 2026	(Your choice)	_____%
E. Desired # sessions increase in 2026	$(B * 1.D)$	_____
F. 2026 Completed Sessions Target	$(A + D)$	_____ sessions
G. 2026 Weekly Session Target	$(F \div 52)$	_____ sessions/wk

To account for cancellations, calculate how many sessions to *schedule* each week:

Example: If the weekly target is 175 sessions and expected cancellations are 30, schedule 205 sessions per week.

H. 2025 Cancel Rate	(Pull from PV)	_____
I. Expected Weekly Cancellations	$(G * H)$	_____
J. Weekly Scheduled Sessions Goal	$(I + G)$	_____

Determine Staffing Needs

Example: To reach 205 scheduled sessions per week, we need 9 full-time therapists if each averages 22 sessions/week.

K. Avg. Sessions Per Clinician Per Week	(Your choice)	_____
L. Number of Full-Time Clinicians Needed	$(G \div K)$	_____

Summary of 2026 Practice-Wide Goals:

Total Sessions Target (F) _____

Weekly Sessions Target (G) _____

Weekly Scheduled Sessions (J) _____

Ideal # of Full-Time Clinicians (L) _____