



Goal Tracking & Role Clean-up Worksheet

Reclaim Your Time Through Better Goal Tracking and Role Management

Goal Tracking Worksheet

Goal Description	Time Horizon	Steps/Milestones	Status
	<div><input type="checkbox"/> Weekly</div> <div><input type="checkbox"/> Monthly</div> <div><input type="checkbox"/> Quarterly</div>		
	<div><input type="checkbox"/> Weekly</div> <div><input type="checkbox"/> Monthly</div> <div><input type="checkbox"/> Quarterly</div>		
	<div><input type="checkbox"/> Weekly</div> <div><input type="checkbox"/> Monthly</div> <div><input type="checkbox"/> Quarterly</div>		
	<div><input type="checkbox"/> Weekly</div> <div><input type="checkbox"/> Monthly</div> <div><input type="checkbox"/> Quarterly</div>		

This month I will prioritize...

Role Definition Worksheet

Core Responsibilities I Own

- ☐
- ☐
- ☐

Tasks to Push Down, Push Back On or Redefine

- ☐
- ☐

Boundary Rules

I will say no when...

I will protect time for...

I will avoid...

Role-Shaping Review

What's Working	What's Not Working	Adjustments

This template helps you proactively manage your responsibilities and boundaries within your role, fostering a more sustainable and fulfilling work experience. Use the Goal Tracking Worksheet to align your quarterly, monthly, and daily tasks with your role objectives, and the Role Definition Worksheet to regularly assess and refine your core duties and boundaries. This iterative process helps reclaim your time, redefine your management role, reduce burnout, and achieve a healthier work-life integration.