



Goal setting – ROI Planner

A key step in goal setting is identifying what specific things you aim to learn at the conference (i.e. identifying specific learning objectives). A good question to ask yourself to identify these learning objectives is:

What are the issues you or your organization faces that you need to find solutions to? (i.e. buy-in, technology, change-management, metrics, leadership, performance measures, etc.)

1. _____

How will you accomplish this goal? (list specific workshops or breakout sessions that address this goal, list people who could assist you, etc.)

If this objective was met, what savings (or new revenue) might be realized?

\$

2. _____

How will you accomplish this goal? (list specific workshops or breakout sessions that address this goal, list people who could assist you, etc.)

If this objective was met, what savings (or new revenue) might be realized?

\$

3. _____

How will you accomplish this goal? (list specific workshops or breakout sessions that address this goal, list people who could assist you, etc.)

If this objective was met, what savings (or new revenue) might be realized?

\$

4. _____

How will you accomplish this goal? (list specific workshops or breakout sessions that address this goal, list people who could assist you, etc.)

If this objective was met, what savings (or new revenue) might be realized?

\$

(Note: The format of this Goal Setting sheet is based on the 2009 Lean Accounting Summit ROI Planner).

5. _____

How will you accomplish this goal? (list specific workshops or breakout sessions that address this goal, list people who could assist you, etc.)

If this objective was met, what savings (or new revenue) might be realized?

\$

Networking

Another important goal you can set is to identify who you would like to meet at the conference. Ask yourself the following question and list down your answers:

Who would you like to meet at the conference (presenters, specific companies or specific people)?

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

Name _____
Company/Organization _____

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