

**Resources for Independent Pharmacies**

## Goal Setting Worksheet: Prioritizing for Success

Whether it's a new year, you're opening a new store, or something's recently changed in the market, revisiting your key objectives and major areas of focus is important for the health of your business. Below are common goals for managing a pharmacy business. Check the boxes that are most important to your success, and consider ranking them in order of greatest impact to your pharmacy to help you get started.

**Priority**

**Business Basics (Ensure Fiscal Fitness)**

- Review business plan, make adjustments, and share with advisors & staff
- Understand new legislation and regulations impacting my business
- Better manage financial areas of my business (e.g., review P&L, cash flow)
- Ensure I'm maximizing reimbursements and reducing audit risks
- Improve my inventory management

**Marketing (Get More Customers/Retain Existing Ones)**

- Create a formal marketing plan and set aside budget
- Improve my Website, online listings, and digital promotions
- Market to physicians to drive patient referrals
- Invest in advertising and community events & outreach
- Utilize PR, local news, and social media to show my clinical expertise

**Clinical Opportunities (Stay Relevant in a Shifting Market)**

- Learn more about my role in Star Ratings and how to retain access to lives
- Strengthen my ability to drive patient adherence & measure outcomes
- Introduce a new clinical service (e.g., immunizations, LTC, weight mgmt.)

**Front End Management (Drive Sales & Profitability)**

- Enhance my customers' experience (e.g., store look, ease of shopping)
- Revisit pricing and merchandising strategies

**Technology (Increase Efficiency & Free-up Time)**

- Maximize use of my pharmacy management system & integrated products
- Explore benefits of automation

**Other Activities**

- Staff (e.g., provide training, optimize scheduled hours)
- Ownership (e.g., acquire a pharmacy, prepare to sell my store)
- Other: \_\_\_\_\_

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