

Individual Wellness Plan (IWP) Template

Instructions: The leadership Individual Wellness Plan (IWP) is a document owned by the leader (or team member) for wellness self-development and role modeling. Its primary purpose is to help leaders and team members reach short- and long-term wellness goals. While the IWP can be utilized by all employees, prioritizing the leadership group initially helps drive high adoption and sets a strong example, ensuring successful implementation when the IWP is rolled out to the rest of your organization.

A-SMART GOALS

Utilizing the A-SMART goal-setting and planning method can boost effectiveness, accountability, and ultimately drive behavior and habit change within the IWP. Consider the following when developing your plan.

- Is it **Aligned** and consistent with achieving your overall wellness, personal, and professional goals?
- Is it **Specific** and **Measurable**? Does it outline details on what's expected and what measures of success are?
- Is it **Achievable**? Are you clear on what actions need to be completed to achieve your goal?
- Is it **Relevant**? Does it identify realistic goals that are attainable and can be achieved over time?
- Is it **Time-based**? Do you have time-bound actions so you're clear on milestones and can celebrate them along the way?

ESTABLISHING AN ACCOUNTABILITY/SUCCESS PARTNER

Goal achievement is easier when you have a buddy, so establishing an accountability/success partner can increase the chances of success.

FOR MORE INFORMATION

[Psychological Secrets to Hack Your Way to Better Life Habits](#)

TAKE ACTION!

1. *Work with all your leaders to develop an IWP so they can effectively role model wellness behaviors.*
2. *Check in with leaders monthly or help them establish an accountability partner.*
3. *Coach leaders on how to integrate the plan within their teams.*
4. *Monitor plans and recognize examples of effective wellness behaviors.*

BENCHMARK 1: Committed and Aligned Leadership



COMPLETE WELLNESS CATEGORY ALIGNMENT Derived from the Well Workplace® Checklist.	WELLNESS GOAL How will you know you're successful?	SPECIFIC ACTIONS	TARGET COMPLETION DATE
Accountability/Success Partner Name and Check-In Dates:			
Physical Health	Example: Bring cholesterol down by 20 points (from 219 to 199).	<ol style="list-style-type: none"> 1. Limiting eating red meat to only one time per week. Incorporate fish into meals one time per week. 2. Walk for 30 minutes every day. 3. Participate in an annual health screening to track progress. 	Build this habit consistently by 1/1/2027. Complete my next annual health screening on 2/15/2026.
Mental Health	Example: Reduce multitasking and increase focus and state of flow.	<ol style="list-style-type: none"> 1. Start each day journaling and setting intentions for the day to one to two tasks maximum. 2. Implement a wind-down routine before bed. 	Do this consistently for a month straight.

COMPLETE WELLNESS CATEGORY ALIGNMENT Derived from the Well Workplace Checklist.	WELLNESS GOAL How will you know you're successful?	INDIVIDUAL WELLNESS PLAN (IWP) TEMPLATE	TARGET COMPLETION DATE
Accountability/Success Partner Name and Check-In Dates:			
Physical Health			
Mental Health			
Emotional Health			
Sense of Meaning/Purpose			
Financial Wellness			
Perceived Safety (Physical and Psychological)			
Professional Development			
Other			

