Setting Goals Tip Sheet

Setting Goals is a process that is completed at the beginning of the year and regularly reviewed (as deemed necessary) when the manager and employee sit down to discuss status updates.

Setting goals fosters communication and collaboration. The manager and employee achieve an understanding, alignment, and agreement when they work together to achieve goals that are Specific, Measurable, Attainable, Relevant, and Time Bound – also referred to as SMART goals. Use the SMART criteria as a guide when making appropriate edits for goal statements.

Specific　　A specific goal is clear and focuses on one topic or area. It can be communicated to others without confusion because it is well-defined and easily understood. The more specific you can be in defining what should be accomplished, the more likely the employee will be to achieve it. Desired goals must answer the six "W" questions.

Who: Who is involved?

What: What do I want to accomplish?

Where: Identify a location

When: Establish a timeframe

Which: Identify the requirement and constraints

Why: Specific reasons, purposes or benefits of accomplishing the goal

Measurable　　A measurable goal has a defined endpoint that is quantifiable (e.g., numbers, percentages, quality, timeliness, and cost). This is important because it is easier to gauge when the goal has been reached and it provides a yardstick to measure progress toward the goal. Think of measures as describing "how" you will know when you've achieved a goal. Identify the source/metric that will be used to measure progress.

Poorly written goal: "Next year, I'll sell a lot of units."

Well written goal: "Next year, I'll sell 30 units/day more than this year."

Attainable　　An attainable goal should challenge to motivate performance. Be careful not to set goals too high; if they are impossible to achieve, the employee may become discouraged. Also, be careful not to set goals too low because if they are, this too will inhibit motivation. Keep things consistent with the resources that are available to successfully achieve the goal.

Poorly written goal: "I will start training today and be ready to run a marathon by next week."

Well written goal: "I will start training today and be ready to run a marathon in six months."

Relevant　　A relevant goal is one that helps an employee to achieve what is important to the individual and the organization. Think of this characteristic as providing the "why" of the goal – the purpose behind achieving it. Does the goal help attain team or organization objectives or targets? Does it help develop the team or employee? Does it tie in with the individual's responsibilities?

Time Bound　　Success requires planning and establishing a time frame that allows the individual to carry out the objective. This should answer "when," "how soon" and "within what period." The manager and employee agree on an end date for the goal and establish status review dates for regular progress monitoring.

Poorly written goal: "I will run a marathon."

Well written goal: "I will run a marathon on October 10 of this year."

The following table shows how you can use a three-part formula to help write goals that address all five SMART criteria.

Action Verb	Results in Measurable Terms	By When
Start with an action verb, such as:	Include a measurement, such as:	Include a due date or time frame, such as:
• Increase	• How much	• Phase 1 by the end of 2nd quarter
• Complete	• How many	• Phase 2 by the end of fiscal year
• Conduct	• How much better	• Daily
• Attain	• How much faster	• Weekly
• Achieve	• Costing how much less	• As scheduled

Additional Tips

Keep these tips in mind when developing clear and concise goals for your employees:

- Allow sufficient time for goal writing.
- Define quantity, cost, timeliness, or quality.
- Avoid writing an "all or nothing" goal.
- Make sure that the goal is observable. The results need to be evident to you and others who will provide feedback on performance.
- Encourage dialogue and be open to what the employee has to say. Ask if the objective will benefit the employee, the team, and/or the organization. If not, consider rewriting the goal.
- Evaluate and re-evaluate progress; have ongoing informal evaluation throughout the year.

Goal Examples

Complete a minimum of 20 hours of professional development-related training by February 1, 2014 with no more than one excused absence; share learning content with team within one month of completing the training.

Send accurate monthly budget balance sheet and YTD department records to the manager by the 30th of each month.

Make travel arrangements within 48 hours of notification for all of Manager A's business trips by making airline, rental car, and hotel reservations; by completing travel advance reimbursement forms and trip report forms, preparing an itinerary and documenting confirmation numbers.

A successful goal setting session results in each person clearly understanding the expectations and both sides are committed and motivated to improve performance in the future.