

Leader's Guide to

GOAL Setting





OVERVIEW

Setting quality goals is the foundation of effective performance management. Often, leaders assume team members understand what is expected of them and team members assume leaders know how they spend their time. Unclear expectations can lead to a lack of accountability and action, which undermines our ability to deliver business results.

By clarifying expectations and setting goals together, you will:

- Drive the performance and behaviors you to achieve business result
- Gain alignment on outcomes, deadlines, and deliverables
- Increase efficiency, clarity, and productivity
- Build trust by sharing the responsibility for setting and achieving expectations

Ideally, every team member should understand his or her goals, how they relate to the team's goals, and how the team's goals contribute to the higher-level strategic goals of their organization.

October	March	August/September	October/November
 Set Goals	 Review Progress	 Evaluate Results	 Summarize Results
Establish priorities for the year	Mid-year performance feedback	Review mid-year results	End-of-year performance feedback
Focus on expectations and goals	Review goal progress and establish focus areas for each goal	Review behavior in alignment with values	Discuss future focus areas
Consider development when assigning work/projects		Self-evaluations	

As part of performance management, we recommend setting goals annually while reviewing the progress of those goals throughout the year. Goal setting is an opportunity for you and your team member to set, clarify, and align expectations.

- **Develop goals collaboratively**
You should have input, collaborate, and agree on role expectations with your team member.
- **Articulate goals**
You should talk openly about expectations and be very clear about what you expect. Make sure your team member is clear on expectations.
- **Aimed at excellence**
Set and align expectations based on best-in-class behaviors.
- **Individualized to strengths**
Focus on your team member's strengths and position.

S.M.A.R.T. GOALS

The S.M.A.R.T. goal framework brings clarity to priorities and translates goals into measurable actions.



Specific

Can you describe the outcome?



Measurable

Can you measure the goal?



Attainable

Can you achieve the goal?



Relevant

Is the goal related to your project/job?



Time-bound

Have you set a deadline for your goal?



Start with a verb

Increase

Attain

Create

Reduce

Achieve



Include a measurement

How much

How many

How much better

How much faster

Costing how much less



Include a due date, time

Phase 1 by end of 2Q

Third week of 4Q

As scheduled

Weekly

March 1

SAMPLE QUESTIONS

- Are these the most important goals to drive business results?
- Is the scope of the goals appropriate?
- Are there too few or too many goals?
- Are the goals aligned to the organization's or team's goals?
- Are measures of success set at the right level?
- Are goals practical or achievable, and are the goals under your team member's control?
- Does your team member have the skills necessary to achieve the goals?



GOAL SETTING MEETING

BEFORE

1. Understand the organization's and function's priorities
2. Review previous year's goals/projects/activities that may carry over
3. Think through work the team member needs to prioritize
4. Identify details you should provide on each goal for the team member to know how to get started
5. Consider recent development or career conversations you have had with the team member

Tips to consider:

- Draft your top 3-5 performance goals –be prepared to share
- Think through any challenges or barriers that could impact the ability of the team member to meet these goals
- Consider 1-2 development goals –be prepared to share

DURING

1. Align with your team member on what is most important for the upcoming year, and connect their goals to organizational priorities and the department goals
2. Engage in two-way discussions to prioritize work and goals
3. Ask clarifying questions when you feel you need more information
4. Align on development and/or career goals for the year
5. Use the SMART framework for goals
6. Agree on an ongoing process and the frequency for check-ins

Tips to consider:

- Ask your team member to share 3-5 performance goals and 1-2 development goals first– this helps create ownership
- Ask the team member's preference for the frequency of check-ins– if they aren't sure check-ins should be monthly at a minimum– twice a month 1:1s are recommended

AFTER

1. Ensure team members have documented their goals in Workday- this will help you and your team member stay aligned, and you can make changes if needed throughout the year
2. Initiate calendar invitations for regular check-ins

Tips to consider:

- You can view your team members' goals in Workday
- Make sure team members are aware of each other's performance goals and how they connect to the overall team priorities
- Commit to keeping your regular check-ins with your team member



MANAGING CHALLENGES

As a leader, you have a responsibility to start the year by providing each team member with clear, achievable expectations. Remember, you will use the individual goals you and your team member set to determine each team member's performance effectiveness, which will in turn drive the decisions you make about their compensation and career opportunities.

Below is a list of common challenges you may anticipate and tips on how to address them.

1	2	3	4	5
Misalignment	Unrealistic	Vague goals	No or little progress	Unbalanced goals
My team member and I see the priorities for the year differently	My team member set goals that I believe are unattainable	My team member's goals are too high level and not specific	My team member has not updated me and/or showed progress on their goals	My team member is focusing on too few or too many goals
↓	↓	↓	↓	↓
Point out where you agree	Acknowledge ambition	Ensure goals are outlined using the S.M.A.R.T. framework	Specifically ask for regular feedback on goal progression	Remember, goals should be created for all aspects of your job, not just one focus area
↓	↓		↓	↓
Explain why you disagree	Address timelines and ensure they account for delays and setbacks		Help the team member identify roadblocks	Understand/clarify your priorities and workload
↓	↓		↓	↓
Use "I" statements	Suggest breaking up goals into smaller, more attainable milestones		Clarify the importance of the work associated with the goal	Focus on quality, not the quantity of goals
↓	↓		↓	
Connect individual goals back to the team and organizational goals and show how they do or don't align	Remind the team member of their priorities and workload		Set clear priorities of how the team member should focus their time	
	↓		↓	
	Share roadblocks (external and internal) that make the goal unattainable		Suggest blocking time to focus on work that the team member tends to avoid	

DO'S

- Draft development/career goals and goals to achieve business results
- Set realistic expectations
- Align with your team member on their goals
- Ensure goals are S.M.A.R.T.
- Encourage your team member to voice their ideas and ambitions
- Check in regularly on goal progress
- Provide guidance and support
- Ensure your team member documents their goals in Workday, and tracks progress regularly in Workday

DON'TS

- Expect every team member to have the same goals
- Overwhelm your team member with too much feedback or fail to provide feedback at all
- Take over the conversation
- Create goals that are a standard part of the job (i.e., compliance training)