



Team Member'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:

- Demonstrate the performance and behaviors to achieve results
- 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
Align on 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 align on focus areas for each goal	Review behavior in alignment with values	Discuss future focus areas
Consider development when requesting 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 leader to set, clarify, and align expectations.

- **Develop goals collaboratively** You should have input, collaborate, and agree on role expectations with your leader.
- **Articulate goals** Your leader should talk openly about expectations and be very clear about what they expect. Ask your leader for clarification when needed.
- **Aimed at excellence** Set and align expectations based on best-in-class behaviors.
- **Individualized to strengths** Focus on your 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 for me?
- Are there too few or too many goals?
- Are the goals aligned with others' goals?
- Are measures of success set at the right level?
- Are goals practical or achievable, and are the goals under my control?
- Do I have the skills necessary to achieve the goals?



GOAL SETTING MEETING

BEFORE

1. Understand the organization's priorities and your function
2. Review previous year's goals/projects/activities that may carry over
3. Identify details you need for each goal to know how to get started

Tips to consider:

- Draft 3-5 performance goals—be prepared to share
- Think through any challenges or barriers that could impact the ability to meet these goals
- Consider 1-2 development or career goals—be prepared to share

DURING

1. Align with your leader on what is most important for the upcoming year
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:

- Share 3-5 performance goals first to create ownership
- Agree with your leader on the frequency of check-ins you prefer.
Check-ins should be monthly at a minimum, twice a month 1:1s are recommended.

AFTER

1. Document goals in Workday
2. Calendar invitations for regular check-ins should be scheduled by your leader

Tips to consider:

- Your leader can view your goals in Workday
- Commit to keeping regular check-ins

COMMON CHALLENGES

It's important to start the year with clear, achievable expectations. Remember, the individual goals you and your leader set will be used to determine your performance effectiveness, which will in turn drive compensation decisions and additional 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
You see the priorities for the year differently	Goals are unattainable	Goals are too high level and not specific	We have not met to discuss progress on goals	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	Set up time to regularly review 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	Clarify key milestones that must be met along the way to achieve the goal	Identify roadblocks	Understand/clarify your priorities and workload
↓	↓		↓	↓
Use "I" statements	Break up goals into smaller, more attainable milestones		Clarify the importance of the work associated with the goal	Focus on quality, not quantity of goals
↓	↓		↓	
Connect individual goals back to the team and organizational goals and show how they do or don't align	Review your priorities and workload with your leader		Set clear priorities of how you should focus your time	
	↓		↓	
	Share roadblocks (external and internal) that make the goal unattainable		Block time to focus on work that you tend to avoid	

DO'S

- Draft development/career goals along with goals focused on result
- Set realistic expectations
- Align with your leader on your goals
- Ensure goals are S.M.A.R.T.
- Voice your ideas and ambitions
- Check in regularly on goal progress
- Ask for guidance and support
- Ensure you document goals in Workday and track your progress regularly

DON'TS

- Expect to have the same goals as other team members
- Act defensively when receiving feedback
- Take over the conversation
- Create goals that are a standard part of the job (i.e., compliance training)