Goal-Setting Template Guide

# Select Your Goals

Explain to your remote staff that the following can serve as a guide for their goal-setting. This can help them choose what to prioritize.

1. Company Strategy - Individual goals must help the organization achieve its business objectives.
2. Division / Department Plans - It should align with your team’s responsibilities derived from the organization’s strategic goals.
3. Organizational problems - Look for areas where improvements can be made to help the organization or your department become more effective. This can be about processes, products, or services.
4. Personal Development and interests - Ask them to reflect on skills or areas they want to improve. Previous performance reviews can identify specific things that will become relevant in the future.

# Make it Collaborative

Step 1: Review the goal-setting process.   
**On Your First Meeting**Discuss the intention to collaborate and agree on the goals to pursue for a specific time period. Share your company and team’s strategic goals. Explain the **Goal-Setting Worksheet** and how this will be used to guide everyday work and performance reviews.   
  
Step 2: Draft a set of goals. Separately.  
**Before the Second Meeting**  
While your remote worker is mainly responsible for their own goals, this process works better if you individually draft a set of goals before your meeting. As you prepare your own list of goals for your direct report, this can be used as a guide for reviewing your staff’s proposed goals.   
  
Step 3: Review their proposed goals.  
**Before the Second Meeting**  
Ask for a copy of their proposed goals. Before your meeting, compare this with your own list and consider the following:

* Are there too many? Or too few?
* Are the goals achievable, specific, and measurable?
* Is it challenging enough to give them room to grow?
* Can this be done within 12 weeks?
* Will its fulfillment contribute to the bigger goals of the company and the team?

Step 4: Finalize the goals.  
**On Your Second Meeting**Share your feedback on their draft goals. Discuss any concerns or problems you or they anticipate. Together write down a list of three to give goals and identify the outcome that will be achieved as a result of that action. Be careful not to confuse activities with goals. Goal statements must focus on action and lead to a clear result.   
  
Step 5: Define a Plan to Achieve.  
**After Your Second Meeting**  
Ask your direct report to complete the rest of the worksheet with details on how they plan to achieve their goals.

|  |  |
| --- | --- |
| **Connection to Strategy:** Explains why the goal is important for the company and team. | **Step by Step Plan:** Imagine the week-by-week level of work to improve success in achieving the goal. Write the main steps that must be completed and specify the immediate steps.   Remind them of their responsibility to keep you updated on the subsequent steps they are taking to carry out the plan. |
| **Measures:** Identify either quantitative or qualitative criteria that determines if a goal has been met. | **Completion Date:** Limit the time to three months maximum. For larger goals, always break them down into smaller parts. Pick the most important area to work on first. |
| **Resources required:** Consider the roadblocks that might prevent them from reaching the goal. Focus on the necessary resources to mitigate risks. |  |

Step 6: Approve the Plan.  
**After Completing the Worksheet**Give them ample time to reflect and complete the worksheet. In about a week, ask them to send it to you for review. If the revisions are minor, an email or instant messaging should be enough. If major changes are needed, it’s better to schedule an online meeting.   
  
Step 7: Agree on Check-ins.  
**Moving Forward**  
Schedule a specific date to check in on their progress, preferably in a one-on-one meeting.

Goal-Setting Worksheet

List 3 to 5 goal statements. Then for each one, create a step-by-step plan for accomplishing your goals.

|  |
| --- |
| **GOAL #1** |
| *For an HR manager at a small organization:*  *Identify 5% savings in the overall costs of benefit programs before the end of Q1.* |

|  |
| --- |
| **GOAL #2** |
| *For a salesperson:*  *Find 35 new leads in Q2 and convert two into customers.* |
| **GOAL #3** |
| *For an IT manager:*  *Test three new methods for communicating with users by March 31.* |
| **GOAL #4** |
|  |
| **GOAL #5** |
|  |

## Goal #1: Action Plan

|  |
| --- |
| **GOAL STATEMENT** |
| What will you achieve? |
| *Identify 5% savings in the overall costs of benefit programs before the end of Q1.* |
| **CONNECTION TO STRATEGY** |
| How will this advance your organization, division, or team strategy? |
| *This will allow our team to realize the overall cost savings that we set for the fiscal year.* |
| **MEASURES** |
| How will you determine if you’ve actually achieved this goal? |
| *The proposed savings will represent a budget reduction of $35,000 (5% of overall benefits budget).*  *It’s also important that employees remain satisfied with benefit options so that fewer than 5% of employees complain in the annual employee survey.* |
| **RESOURCES REQUIRED** |
| What will you need in order to complete your plan? |
| · *Buy-in from head of HR*  · *Extra time from HR admin to do research into additional options* |

|  |
| --- |
| **STEP-BY-STEP PLAN** |
| What are the main steps you need to take to achieve your goal? What are the immediate next steps? |
| **Main steps:** |
| · *Share plan with VP of HR to get her buy-in.*  · *Conduct research on benefit package alternatives with help from HR administrative staff.*  · *Meet with benefits brokers.*  · *Review pros and cons of each alternative.*  · *Put together several options for achieving 5% cost reduction.*  · *Make recommendations to VP of HR.* |
| **Immediate next steps:** |
| · *Confirm research plan with VP of HR.*  · *Review employee survey results on benefits.*  · *Lay out research plan for HR admin, including what alternatives to look into.*  · *Set up meetings with three benefits brokers.* |

**Completion Date: March 31**

## Goal #2: Action Plan

|  |
| --- |
| **GOAL STATEMENT** |
| What will you achieve? |
| *Find 35 new leads in Q2 and convert two into customers.* |
| **CONNECTION TO STRATEGY** |
| How will this advance your organization, division, or team strategy? |
| *The revenue from the two new customers will help us achieve the 5% growth target across the company. The additional leads will lay the groundwork for realizing additional revenue in Q3 and Q4.* |
| **MEASURES** |
| How will you determine if you’ve actually achieved this goal? |
| · *List of 35 leads*  · *Two completed purchases from new customers* |
| **RESOURCES REQUIRED** |
| What will you need in order to complete your plan? |
| · *Input from marketing on potential leads*  · *Short-term relief from admin responsibilities in order to focus on contacting leads;*  *possibly hire a temp* |

|  |
| --- |
| **STEP-BY-STEP PLAN** |
| What are the main steps you need to take to achieve your goal? What are the immediate next steps? |
| **Main steps:** |
| · *Confer with marketing about ideal target profile.*  · *Request target list from marketing.*  · *Adjust existing marketing collateral.*  · *Reach out to existing customers for referrals.*  · *Compile and prioritize target list.*  · *Contact targets (most promising ones first).*  · *Set up sales calls.*  · *Follow up on sales calls.*  · *Complete sales.* |
| **Immediate next steps:** |
| · *Meet with marketing to review ideal target-customer profile.*  · *Request a lead list.*  · *Review existing marketing collateral.*  · *Set up calls with three loyal customers who have offered to be referrals.*  · *Revise marketing collateral to reflect needs of leads.* |

**Completion Date: June 30**

## Goal #3: Action Plan

|  |
| --- |
| **GOAL STATEMENT** |
| What will you achieve? |
| *Test three new methods for communicating with users by March 31.* |
| **CONNECTION TO STRATEGY** |
| How will this advance your organization, division, or team strategy? |
| *It will help us reach our number one goal for the year: Improve user satisfaction with IT services by 25%.* |
| **MEASURES** |
| How will you determine if you’ve actually achieved this goal? |
| *Three tests will be completed and results analyzed, and a recommendation will be made regarding which option to pursue or to conduct further testing.* |
| **RESOURCES REQUIRED** |
| What will you need in order to complete your plan? |
| · *10 hours of time from the director of research to help structure experiments and analyze results* |

## 

|  |
| --- |
| **STEP-BY-STEP PLAN** |
| What are the main steps you need to take to achieve your goal? What are the immediate next steps? |
| **Main steps:** |
| · *Review what’s been tried before.*  · *Generate testing options.*  · *Structure tests and plan for analysis.*  · *Run tests.*  · *Analyze results.*  · *Make recommendation.* |
| **Immediate next steps:** |
| · *Review goals of user communications with manager.*  · *Meet with other IT managers to find out what they’ve tried in the past.*  · *Meet with director of research to discuss testing methodology.*  · *Hold brainstorming meeting with IT managers and a minimum of five target users to discuss users’ needs and better ways to communicate.*  · *Decide whether to run tests sequentially or simultaneously.* |

**Completion Date: March 31**