

# How-to Guide

## Goal Setting

### PURPOSE OF THIS DOCUMENT:

This document provides practical guidance on goal setting. Goal setting should be supported by the company performance management processes.

Goals can focus attention on achieving desirable outcomes. Employees prefer to know what they need to accomplish, and goals provide that direction.

Goals should be specific, measurable, achievable, and timely and when Goals have been achieved they present an opportunity for celebration.

**Goal setting:** *Translating business strategy and customer requirements into goals for teams and individuals practically and responsively, to deliver the desired business performance.*

## Guidelines for Practical Goal Setting

### 1. UNDERSTAND BUSINESS CONTEXT

- Goals must be orientated on where your business is headed in the long-term.
- Align goals to business strategic priorities.
- Attain input from key stakeholders to ensure goal alignment on key priorities.
- Give thought to key customers, as they are direct recipients of the team's outputs, be these services or products.
- Key areas to review pre-goalsetting include:
  - previous year's performance,
  - budget,
  - resourcing,
  - any other content pertinent to the new business financial year

### 2. CASCADE GOALS DOWNWARDS

Goal setting is led by the team leader and can be facilitated by the HR Specialist

- Ensure that the goals are cascaded downwards (business, departmental, team, individual)
- Top-level goals can be used as a framework for the leadership teams across the business.
- Ensure a more efficient cascade of team goals by using the same goals for like departmental teams - just adjust the key performance indicators for relevance.
- Team goal setting should be drafted first as these inform individual goals
- Lastly, set individual goals in alignment with team goals

### 3. WRITE GOALS AS OUTPUTS

- Ask: What is the deliverable that needs to be achieved?
- Goals should be articulated as outputs and described using key performance indicators.
- The output should:
  - Relate to strategic priorities
  - Relate to significant customer requirements
  - Be articulated from the customer's perspective
  - Be within your power and influence to deliver
  - Only refer to routine goals if these routines are not working well, thereby creating risk or cost to the organisation
  - Include managerial and leadership work
- Agree on a list of team goals that are phrased as outputs.
- To ensure focus on the most high-leverage goals, limit the number of goals to 5- 6 goals per team.

### 4. ENSURE KEY PERFORMANCE INDICATORS ARE CLEAR

A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively a company is achieving key business objectives. High-level KPIs may focus on the overall performance of the business, while low-level KPIs may focus on processes in departments such as sales, marketing, HR, support and others.

Key Performance Indicators tend to answer the following questions:

- Implemented how?
- By when?
- With what desired impact?
- Meeting what standards?
- At what cost? Within what budget?
- Approved by whom?

### 5. ENSURE YOUR GOALS ARE SMART

A SMART goal should clearly state what you want to accomplish, why it is an important goal, and how you intend to accomplish the goal. Furthermore, it should be specific, measurable, attainable, relevant and time-based.

<b>S = Specific</b>	A specific goal should clearly state what you want to accomplish, why it is an important goal, and how you intend to accomplish the goal.
<b>M = Measurable</b>	A measurable goal should include a plan with targets and milestones that you can use to make sure you're moving in the right direction during the process and should clearly tell you when you've completed the process.

<b>A = Attainable</b>	An attainable goal should be realistic and include a plan that breaks your overall goal down into smaller, manageable action steps that use the time and resources available to you within the timeline you've set.
<b>R = Relevant</b>	A relevant goal should make sense when measured against your business strategy, mission statement, market, client base and industry.
<b>T = Time-Based</b>	Business goals cannot be open-ended; every goal should be limited by a period of time. The timeline may vary by weeks, months or years depending on your goal, but a defined timeline is vital in order for you to commit to the goal.

## 6. TEAM ROLE MATRIX ENSURES ROLE CLARITY DURING THE DELIVERY OF GOALS

The team roles are as follows:		
<b>R</b>	<b>Responsible</b>	This team member does the work to complete the task. Every task needs at least one Responsible party, but it's okay to assign more.
<b>A</b>	<b>Accountable</b>	The team member with the A has overall accountability for delivering the output. This means that he/she will either do the bulk of the work, or will coordinate the delivery of the output, based on work done by a number of team members.
<b>S</b>	<b>Support</b>	Team members with S roles will provide support to the person with the A. Support refers to specific work that must be done towards goal delivery. These team members are responsible for meeting the requirements of the goal, including deadlines, participating in team meetings associated with the output.
<b>C</b>	<b>Consult</b>	Team members with C roles (if any) must be consulted with, in order to deliver the goal. These team members are knowledgeable about specific aspects of the team's work and can add value by advising the team.

# Goal Setting Template

Team Name				
Financial Year				
GOAL 1 <i>(what will you need to deliver to achieve the overall goal?)</i>	KPIs <i>(A clear metric, quantifiable, where possible, that demonstrates how a goal has been achieved)</i>	Team Roles	Target	
			On Target	Exceeded
<b>Output</b> <b>Example :</b> New employee development program launched	<ul style="list-style-type: none"> <li>Document career path matrix for all employees</li> <li>Start a leadership development program by end Feb</li> <li>Launch a new employee learning system by June</li> </ul>	R – HR Specialist A – HR Manager S – Training Specialist	Jan 2021 Feb 2021 June 2021	
GOAL 2	KPIs	Team Roles	Target	
			On Target	Exceeded
Output				
GOAL 3	KPIs	Team Roles	Target	
			On Target	Exceeded
Output				
GOAL 4	KPIs	Team Roles	Target	
			On Target	Exceeded
Output				
GOAL 5	KPIs	Team Roles	Target	
			On Target	Exceeded