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# Setting Meaningful Goals that Stick

# A Two-Part Framework for Employees and Managers

Understanding how people want to grow in their role, and working collaboratively to set the goals needed to get there is the foundation to individual and team performance.

This two-part framework will guide your employees through a self-reflection that will offer them, and you, a full picture of how they want to develop in their role. The insights from the reflection will help you concretize individual goals together, and understand how they will contribute to the team objectives, and the company strategy at large.

## Refer to this chart when brainstorming and setting goals:

Your Company's Strategy & Values

Your Team's Objectives

Motivations

Stretches

Strengths

Context

Goal

Your Role

- **Performance goals:**
  Directly linked to team objectives & organizational strategy and values.

- **Development goals:**
  Aim primarily to help the person evolve in their role, but ultimately feed the team objectives.

# What to Expect
# in the Goal Setting Process
# [Manager and Employee]:

## STEP 1

Team members are invited to fill out the **Employee Self-Reflection Exercise**, brainstorm on their goals, then share it with their manager.

## STEP 2

Once it's been shared, the manager can take the time to read the team member's responses to the self-reflection and brainstorm on potential goals for that person.

## STEP 3

In a 1-1, discuss the brainstormed goals, then use the **Collaborative Goal-Setting Framework** to concretize and prioritize goals for the next three months.

## STEP 4

Follow up as needed with a formal sync to reassess goals every three months.

## PART I:
# Employee Self-Reflection Exercise

Take the time to reflect on yourself and your experience at work over the past three months. This reflection or 'audit' of how you have been feeling and contributing will help you and your manager work together to create future goals that are attainable and meaningful to both you and the business. Formally revise these goals together every three months (with check-ins in between) to track progress or make changes where needed.

## What to Expect:

1. **Self-Reflect:** Read through the questions and complete the self-reflection document. Then, brainstorm individually on the best potential goals for you. This step can take a good hour. Once that's done, share the document with your manager to let him/her know you have answered all the questions and are ready to solidify goals together in a 1-on-1 meeting.

2. **Define Goals with your manager:** During that 1-on-1, have a collaborative discussion around your reflection and proposed goals. Together, formulate and decide on clear, specific goals that will contribute to your development and performance.

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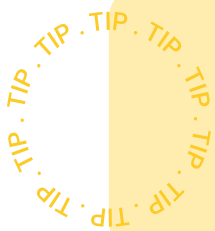
The more honest you are with yourself and your manager, the easier it will be to set the right goals!

# Employee Self-Reflection Exercise

## Look Back

**Take an audit of how the past three months of work have been. There's no right or wrong!**

1. How have you contributed to reaching the team's objectives?
2. What challenges have you faced in the last three months?
3. What are you most proud of in the last three months?

## About Me

**Based on your skills, reflect on what you can work on and what might be in your way.**

1. What are some of your greatest strengths?
2. What motivates you the most at work?
3. How do you embody your company values in your work?
4. Give specific examples of things you do in your work that make use of your strengths.
5. If the majority of your time at work is spent in a way that does not use your strengths, what could be changed?

## Look Forward

**Think about actionable goals you would like to focus on for the next few months.**

1. How would you like to use your strengths in the future?
2. What is one skill that is harder for you that you could work on?
3. Which of our company values do you think you could embody more?
4. What are some potential goals that you could work on that align with your development needs, team objectives, business strategy and values?
5. What could help you reach these goals (support/resources/training/mentorship)?

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Share your reflection with your manager, then individually brainstorm on goals before you discuss and concretize them in a formal 1-on-1. Remember to be mindful while you set goals; think of current work-life context and what is realistic for you.

# PART II:
# Collaborative Goal-Setting Framework

After having read your employee's self-reflection and brainstormed on goals to kick off the conversation, book a 1-on-1 with your employee to discuss their reflection together. The manager's role during this exercise is to help their employees see the bigger picture and ensure that their goals are both intrinsically motivating and aligned with business needs.

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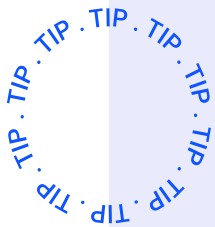
We believe that having the employee be the one to take notes during this meeting is empowering and will encourage accountability.

**Aim to co-create 2-3 SMART goals that fall into one or both of these categories:**

1. **Performance goals:**
   Goals directly linked to team objectives + organizational strategy and values.

2. **Development goals:**
   Goals that aim primarily to help the person evolve in their role—but ultimately feed the team objectives.

# Goal Statement: *The name of your goal...*

| | | |
|---|---|---|
| **Specific** | What do you want to accomplish? | *Your answer...* |
| **Measurable** | How will you and your manager know that the goal has been achieved? | |
| **Attainable** | What makes you feel confident that this goal is both attainable and challenging?<br><br>What could get in your way?<br><br>Do you need help from someone, a particular tool or resource? | |
| **Relevant** | How does your objective contribute to your team objective, company strategy, and/or embodying its values? | |
| **Timebound** | When do you aim to achieve your objective? | |
| **Category** | Is this a performance goal or development objective? | |
| **Title** | How will you formulate your goal statement? | |
| **Action Plan** | What are the exact next steps you need to take to ensure that you are set up to reach your goal? | |

**That's a wrap!** Keep track in regular 1-on-1s with a more formal assessment every three months. The key is continuous communication, transparent discussions, and teamwork!

This framework was developed with love by our Learning & Development Team.

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## 1-on-1 Agenda

### Remote Work Check-In

Now that we're working from home, how can I help the team achieve its new goals?

How is your contribution to ⊘ Align too ambiguous or unclear?

Does the team need my help to identif could help them to achieve ⊘ Align

How can I better help the team achiev considering my role?

### Topic suggestions

💬 Discuss mindset and growth

🎯 Align with team goals

〰️ Promote engagement

+ What are the best ways for you to communicate with me when your role and your responsabilites at work aren't clear to you

**Set goals with your team, hold effective 1-on-1s, and keep track of employee progress, all in one place with Officevibe.**

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