

Goal-setting Conversation Guide for team members

To succeed in your role, you need a clear understanding of what you need to achieve. Your goals should help you know what outcomes to aim for while remaining flexible enough to respond to essential changes. The plan can then be refined and updated as needed.

PURPOSE: To set goals and expectations

HOW LONG: 30 to 60 minutes

HOW OFTEN: At the beginning of the goal cycle, then updated as needed



Preparation

1. Which 3 to 5 priority areas are important for this goal cycle?
2. What information do you need from others to help in setting your goals?
3. What key insights from your last performance review would be helpful?
4. Where can you include a level of stretch?
5. What strengths can you use further, and where?

The conversation

Say something like

Priorities:	<ul style="list-style-type: none"> ● Identify your 3 to 5 core priority areas and their order of importance. Check that these align with your unit and manager's goals. 	<p><i>I see my core priorities as...</i></p> <p><i>These contribute to our unit by ...</i></p> <p><i>A valuable development area for me is to...</i></p>
Outcomes:	<ul style="list-style-type: none"> ● Agree what success looks like with each priority, together with any deadlines needed. (See examples of measures overleaf). Challenge yourself to take on a level of stretch in one or two areas. 	<p><i>The outcome I need to achieve with each priority is...</i></p> <p><i>The target date with each priority is...</i></p> <p><i>The two or three competencies for each priority are...</i></p> <p><i>The right level of stretch for me is...</i></p>
Milestones:	<ul style="list-style-type: none"> ● Set outline milestones to help you track progress. These may change, so update them if needed. 	<p><i>My main checkpoints are...</i></p> <p><i>The first checkpoint is...</i></p> <p><i>My aim is to complete that by (date)...</i></p>
Resources:	<ul style="list-style-type: none"> ● Explore what resources you will need. These may include a budget, access to expertise, additional skills, people, etc. 	<p><i>I will need these resources...</i></p> <p><i>Areas where I would value coaching or support are...</i></p>
Risks:	<ul style="list-style-type: none"> ● Examine possible risks in advance. Ask your manager what boundaries or limits you need to be aware of. 	<p><i>Looking ahead, the main risks I can see are...</i></p> <p><i>I can take 'smart' risks in [X] area...</i></p>
Next:	<ul style="list-style-type: none"> ● Build momentum by setting out your first one or two actions with each priority. 	<p><i>My immediate actions are to...</i></p>

Typical Ways To Measure Goals

Results

You are likely to have one or more goals that aim for a specific result such as a number, quality standard or rate to reach. Other measures include:

Production output	Delivery response times	Operating costs	Sales
Customer satisfaction levels	Percentage of market share	Staff turnover	Defect rate
Improvements implemented	Time per transaction		

Competencies

Competencies are the essential skills, knowledge, behaviors and attitudes that you need to demonstrate. They can be a goal in their own right or combined with a specific result. Some of the most common headings include:

Building relationships	Budget management	Communication
Commercial acumen	Personal responsibility	Drive and resilience
Teamwork and collaboration	Problem solving	Service orientation
Personal impact	Critical thinking	Leadership

Stretch

The right level of challenge will depend on what works for you. Discuss this with your manager and choose what would be a great goal to aim for.

Contribution to colleagues' success

Helping others to succeed can be a key priority for people, either as part of a project team or in your day-to-day co-operation with colleagues. This may include sharing knowledge and expertise, providing access to networks, or coaching colleagues.

Innovation

Measures may range from setting an expectation for continuous improvement, achieving new solutions or—at the far end of the scale—invention. This will depend on your organization, unit purpose and your specific role. Example measures include:

Number of new ideas proposed	Amount of evidence gathered
Number of stakeholders consulted	Ideas moved forward for experimentation
Ideas implemented or commercialized	Revenues achieved
Existing products/processes used in new contexts	Enhanced reputation

Learning

Learning may be at individual, team, or organizational level, and is often measured through the increase in the skills or knowledge gained. For example, it may be important for you to build expertise in your area of work or in a particular market or industry.