

# Goal-setting Conversation Guide for managers

Clear targets help people to focus their efforts and take responsibility for outcomes. The goal-setting conversation should help each person to answer two core questions: ‘Where are we going?’ and ‘What do I need to achieve?’

**PURPOSE:** To set out goals and expectations

**HOW LONG:** 30 to 60 minutes

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

## To explain strategic direction: “Where are we going?”

## Say something like

- Open with energy. Emphasize the value of the conversation.
- Confirm timings and how notes will be captured.
- Briefly explain the strategic direction of the organization and your unit.

*This is our chance to plan what best to work on and why.  
Here is where we are going...  
Your role in this is important because...*

## To set each person’s goals: “What do I need to achieve?”

Jointly explore the expectations for their role:

### Core Priorities:

- Jointly set three to five core priorities.
- Identify any order of importance.

*Let’s pool our ideas about the best core priorities to focus on.*

*Which is most important? And next?*

### Outcomes:

- Confirm what success looks like and how this will be measured. This may be in outline only if goals need to remain agile.
- Agree whether each target is flexible or must be reached precisely.
- Where a goal has a target date for completion, identify that deadline.
- Encourage people to include a level of stretch.

*What outcomes are needed with each priority?*

*How precise does each outcome need to be achieved?*

*When does each goal need to be completed?*

*What would make a great stretch goal for you?*

### Milestones:

- Set checkpoints to help people track progress.

*What milestones will help you to know if things are on track?*

### Resources:

- Plan any resources needed to carry out the goal.

*What do you need to get started?*

*How can I help?*

### Risks:

- Set out critical boundaries.
- Provide autonomy where possible.
- Conduct a “pre-mortem” to understand the challenges.

*The limits with each goal are...*

*Where can you take “smart” risks?*

*If [X] was to go wrong and we were now looking back, what could we predict might be the cause?*

## Summarize the conversation

## Say something like

- Thank them for their contribution.
- Check for ownership and understanding.
- Schedule your first progress update.
- Close with a positive comment about the year ahead.
- Follow up if and when goals change.

*Thank you for all your input with this.*

*What are your thoughts about this plan?*

*When is a good time to hold our first progress update?*

*Your goals make a great contribution to our unit.*

# Typical Ways To Measure Goals

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## Results

Most people will have one or more goals that need to achieve a specific result such as a number, quality standard or rate. Other measures may include:

|                              |                            |                         |              |
|------------------------------|----------------------------|-------------------------|--------------|
| Production output            | Delivery response times    | Operating costs         | Sales        |
| Customer satisfaction levels | Percentage of market share | Staff engagement levels | Defect rate  |
| Improvements implemented     | Time per transaction       | Chargeable hours        | Stock levels |

## Competencies

Competencies are the essential skills, knowledge, behaviors and attitudes that the jobholder needs to use. They may be set in their own right or added to another measure such as a “hard” result. Common headings include:

## Stretch

The right level of stretch varies from person to person. A ‘do your best’ approach often works more effectively than a specific target as this leaves room for people to experiment.

## Contribution to colleagues

Helping others to succeed can be a key priority for people in some roles, either as part of a project team or in their 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 the individual’s specific role. A “do your best” approach again works well: your aim is often to encourage the creation of ideas rather than grade the outcome. Where measures are required, these may include:

|                                                  |                                         |
|--------------------------------------------------|-----------------------------------------|
| Number of new ideas proposed                     | Amount of evidence gathered             |
| Number of stakeholders consulted                 | Ideas moved forward for experimentation |
| Ideas implemented or commercialized              | Patents granted                         |
| 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 the individual to build expertise in their area of work or in a particular market or industry. Learning can also be a good way to measure progress towards an innovation goal.

In some cases, it may be possible to set a measure based on the expected impact—such as happier customers, increased sales, fewer complaints, increased production, and better employee retention.

## Other measures

These may include measures such as maintaining wellbeing, increasing diversity, achieving sustainability.