

Create Your Perfect Goal

The approach to goal-setting isn't one-size-fits-all. The pursuit of goals within an organization depends on the particular business initiative, the results desired, and the resources and roles used to achieve them. Choosing the correct goal structure that suits the preferred outcome is critical to achieving success. Use this worksheet to better understand the different goal structures and how to use them, based on the project or objective at hand.

Long-Term Goals

How to Use a Long-Term Goal:

A long-term goal defines a success point in the distant future, usually 12 months or longer. To stay on track, break them down into simpler checkpoints to focus on manageable stages of the progress.



How to Build a Long-Term Goal:

What is the desired outcome? _____

What must be accomplished? _____

Who will contribute along the way? _____

What are your milestones? _____

How & when will contributors be involved in each milestone? _____

Do they have a way to collaborate and follow up with one another? _____

Short-Term or Agile Goals

How to Use a Short-Term Goal:

Short-term goals are used to achieve outcomes in a short cycle. They are executed by focusing on one clear and concise objective at a time. Agile goals, specifically, are designed with an inherent sense of urgency and are worked on by a team of contributors in congruence. They are designed to get results quickly and collaboratively, while continually making adjustments and improvements along the way.



How to Build a Short-Term Goal:

Is the goal part of a long-term objective? _____

What is the single, clear outcome of this goal? _____

When does the goal need to be completed? _____

Who is contributing to this goal? _____



Does it need to be easily adaptable? _____

When do contributors need to check-in on progress to adjust? _____

Do contributors have a way to collaborate on a frequent basis? _____

Objectives and Key Results

How to Use OKRs:

OKRs use a simple framework for defining and tracking objectives and their desired outcomes. OKRs provide focus, alignment, collaboration and transparency within teams and organizations. OKRs work well in companies that want to foster transparency and provide the opportunity for contribution at all levels to the corporate strategy.



How to Build OKRs:

What is the specific objective you aim to achieve? _____

Is there an opportunity to align your objective to demonstrate your contributions to a department or corporate key result? _____

What key results are needed to demonstrate achievement of that objective? _____

What tasks need to be completed in order to accomplish the key results? _____

How will you collaborate as individuals progress through key results? _____

SMART Goals

How to Use a SMART Goal

SMART goals are structured to ensure every goal is measurable, achievable, and has a clear outcome. We take an evolved approach to the goal-structure to account for engagement and motivation to craft goals that are more valuable, consistent, and meaningful to individuals.



How to Build a SMART Goal:

What are the specific parameters and outcomes of this goal? _____

What is the individual's motivation level to achieve this goal? _____

How attainable is this goal to the individual's abilities? _____

Is this goal relevant to the individual and the organization? _____

How will you track progress toward the outcome? _____



Performance Goals

How to Use a Performance Goal?

Performance goals are designed to help develop an individual over time. These goals can include continued education, problem-solving, and acquiring new skills. Performance goals must clearly demonstrate some type of measurable progress.



How to Build a Performance Goal

What new skill or knowledge is the individual aiming to acquire?_____

What resources will they need?_____

Is it a structured course or self-paced learning?_____

When will the individual complete their learning or training?_____

What kind of conversations will you need to have along the way?_____

How will you implement this learning once completed?_____

