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SMART GOALS TEMPLATE

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SMART goals help improve achievement and success. A SMART goal clarifies exactly what is expected and the measures used to determine if the goal is achieved and successfully completed.

A SMART Goal is:

Specific (and strategic): Linked to position summary, departmental goals/mission, and/or overall company goals and strategic plans. Answers the question -- Who? and What?

Measurable: The success toward meeting the goal can be measured. Answers the question -- How?

Attainable: Goals are realistic and can be achieved in a specific/reasonable amount of time.

Relevant (results oriented): The goals are aligned to overall company goals and are relevant to the team member

Time framed: Goals have a clearly defined time-frame including a target/deadline date.

SMART GOALS

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NOT a SMART Goal:

● Employee will improve customer satisfaction levels.

Does not identify a measurement or time frame, nor identify why the improvement is needed or how it will be used.

SMART Goal Example:

● The department would like to increase customer satisfaction levels to improve customer retention rates. This will be done by informing the client about a simple feedback form they need to fill out once a tickets is closed. A 'Love' rating will add +10, a 'Good' rating will add 0, and a 'Bad' rating will add -10 to the customer service score. The customer service rep with a customer service score of 200 or more each month will be awarded $100.

SMART Goal is:
● Specific
● Measurable
● Attainable
● Relevant
● Time Framed

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SMART GOALS PLANNING

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Specific - WHO? WHAT?

Measurement/Assessment - HOW?

Attainable/Achieve - REASONABLE?

Relevant - EXPECTED RESULT?

BY:

Timed - WHEN?

Customer Service Surveys

Specific	Based on the # of customer service points from a 5 question survey that an individual/team accumulates during the contest period. Contest type is single goal; any individual/team that hits the goal will be rewarded.
Measurable	Measured by # of customer service survey points
Attainable*	Individual Goal: 100 Team Goal: 1000
Relevant	*To Business:* Achieving a higher customer service score will indicate higher customer satisfaction, better customer retention & advocacy *To Individuals* Suggested Award: Individual - $50 Team - $250
Time Frame	Monthly

*Make sure goal is attainable. Best practice is to decrease goal if less than ⅓ of team members do not hit goal, and to increase goal if more than ⅓ hit goal.

SMART GOALS EXAMPLES

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Zero Overdue Tickets	

Specific	Based on the # of tickets for a tech that were overdue during the contest period.
Measurable	Measured by # of overdue tickets
Attainable*	Individual Goal with 3 Tiers: 1st Goal: 0 Overdue Tickets 2nd Goal: 1 - 5 Overdue Tickets 3rd Goal: 6 - 10 Overdue Tickets
Relevant	_To Business:_ A low # of overdue tickets will increase customer service levels. By completing tickets on-time, the tech is in frequent communication with the customer until the issue is resolved. _To Individuals_ Suggested Award: 1st Goal- $50 2nd Goal - $25 3rd Goal - $10
Time Frame	Monthly

*Make sure goal is attainable. Best practice is to decrease goal if less than ⅓ of team members do not hit goal, and to increase goal if more than ⅓ hit goal.

SMART GOALS EXAMPLES

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Employee Of The Month	

Specific	Based on employee performance & engagement. The employee with the highest engagement score (monthly cumulative score from engagement program) is the "Employee of The Month." There is only one employee of the month each month.
Measurable	Measured by Engagement Score
Attainable*	Individual Goal is 200. Employee must reach 200 in order to be eligible for 'Employee of The Month.'
Relevant	*To Business:* A high average engagement score indicates high company performance & engagement levels leading to a highly effective team giving your business a competitive advantage. *To Individuals* Suggested Award: $250
Time Frame	Monthly

*Make sure goal is attainable. Best practice is to decrease goal if less than ⅓ of team members do not hit goal, and to increase goal if more than ⅓ hit goal.