

MANAGER'S GUIDE:

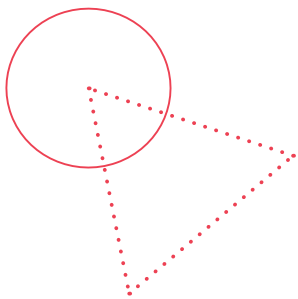
Team goals creation and alignment worksheet

We've designed this guide to help managers and teams work through the process of establishing and prioritizing team-level goals which ideally align with organizational objectives. Additionally, this guide will help team members develop their own individual goals to contribute to and drive team and company goals. Of course, people leaders and HR managers can use this worksheet as foundation to train and guide managers to lead their teams through their goal setting and alignment processes.

Goal alignment

Goal alignment is the process by which goals at various levels within the workforce are intentionally designed to support overarching company goals. A fundamental element of effective team goals is establishing alignment and transparency between individuals, the team, and the organization so everyone is working toward a higher, shared set of objectives. Ultimately, individuals' goals should be aligned with their team's goals, and team goals should be aligned with the goals of the department and company.

Goal alignment is important for various reasons, including:

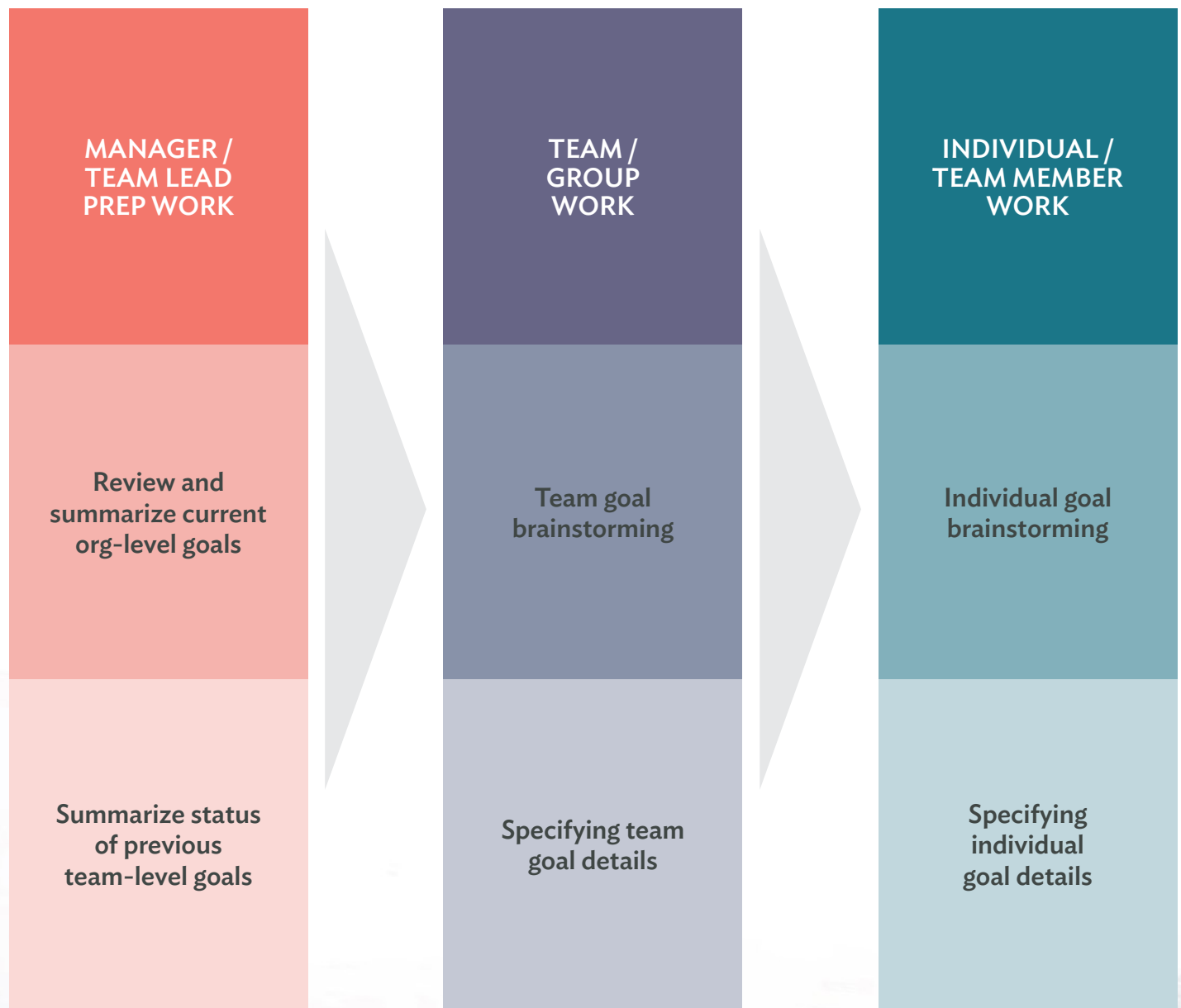


- Enhancing transparency of priorities and strategy
- Driving effective collaboration and communication
- Instilling a sense of purpose, contribution, and accountability
- Building confidence that individuals and teams are working on the right thing
- Creating sustainable motivation
- Elevating performance and retention

If you'd like to learn more about how to create goals that truly drive performance, check out our [Science Behind Team Goals](#) and [Setting & Tracking Team Goals: Let's Get SMARTER](#) articles.

The three levels of goal development exercise

This guide provides goal development exercises at three levels:



Manager/Team Lead prep work

Let's get started! First, we'll kick things off with some light Manager/Team Lead prep work.

STEP

1

Organizational goals: Review and summarize your company's (or department's) overarching quarterly, bi-annual or annual goals based on what's most relevant. Make sure you are able to explain details such as their importance, timing and progress milestones, general strategy for achieving them, and what success looks like.

Organizational-level goals	Indicate ✓ which org goals are most relevant to your team
1.	
2.	
3.	
4.	
5.	

Jot down your quick thoughts on how your team can contribute to the higher-level goals or how the org goals may influence your team's priorities:

STEP

2

Previous team-level goals: Quickly write down your most recent team goals and identify if they've been completed, are continuing, or have been paused or stopped. Use this review to highlight any critical goals that are being carried forward. Additionally, identify why certain goals have been paused or stopped to ensure similar potential challenges are addressed while setting new goals.

Previous team-level goals	Completed / Continuing / Paused / Stopped
1.	
2.	
3.	
4.	
5.	

Jot down your thoughts regarding how your team's recent goals influence or carry forward to the new team goals:

Team-oriented work

STEP

3

Team Brainstorming: Work with key members of your team to ideate on quarterly, bi-annual or annual team goals. To keep things productive, the brainstorming team should include no more than four to five people. Consider this as an iterative process and create a safe space in which individuals can have open, non-judgemental conversations and where everyone feels comfortable to share ideas and concerns.

1. Walk through the org and previous team goals from steps 1 and 2 and have an open discussion on priorities, what has worked, and where challenges have presented themselves. Remember to keep these discussions non-judgemental even if there are disagreements about what has worked or failed in the past.

Identifying which org goals your team can impact is important. Ideally, each goal your team creates will align with a higher-level goal, but that won't always be the case. When a goal doesn't align but the team feels it's important, the justification for each that goal needs to be clear & documented.

2. For each relevant org level goal, use a whiteboard or Kanban tool (or any other internal ideation tool that you are comfortable with) to brainstorm for 5-10 minutes on potential team goals that most effectively contribute to the higher goal. For more information on different types of goals, check out our [Framework for employee performance goals blog](#).
3. Identify any other potential goals that may not necessarily align to organizational or department goals. Talk through whether these are absolutely critical and if they are, include them in the final goals list and be sure to document why accomplishing each non-aligned goal is so important.
4. When the group has identified its top three to five goals, use the next table to write a simple but clear description and assign an owner for each one.

New team goals

Owner

1.

2.

3.

4.

5.

Any additional notes:

STEP

4

Team breakouts: As a group, review effective goal setting based on **SMARTER goals** guidelines and the following blank template. Split up into smaller groups led by each goal owner or give them time to complete it for each separate goal. Ideally, anyone who is going to be contributing to achieving the goal should be given the opportunity to provide input into these additional details.

Team goal:

Due date	
What are three to five measurable milestones or key results to help ensure success? <i>Ideally, include dates or timeframes</i>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>
Who owns this goal or is ultimately responsible for its success?	

Team goal (continued)

Which higher goal does this align to? <i>If none, why is it important?</i>	
Shared publicly or privately? <i>If privately, why?</i>	
Priority level: high/ medium/low <i>(if "low" - is this a necessary goal?)</i>	
Additional resources needed, if any	
Concerns or potential constraints to achieving this goal, if any	
How might we reward and recognize progress and success?	

Individual goals

The process and concepts above can be applied to developing individual level goals as well. As a manager, work with each of your direct reports to review the team goals and brainstorm on each team member's individual goals. The objective is to help each team member identify goals that clearly contribute to the team goals while providing enough latitude for them to be inspired to do great work and develop their skills. Individual level goals can be particularly motivating when one or two focus on contributions to the team and the one or two focus on individual development and growth. Encourage your direct reports to ideate on their own and share their ideas with teammates to get feedback.

Again, if you'd like to see examples of different types of goals, check out our [Framework for Employee Performance Goals](#) blog.

Individual goals:	Timeframe <i>(Weeks, month, quarter, etc.)</i>
1.	
2.	
3.	
4.	
5.	

Any additional notes:

Now use this template to specify the details for each goal:

Individual goal:

Due date	
What are three to five measurable milestones or key results to help ensure success? <i>(Ideally, include dates or timeframes)</i>	1.
	2.
	3.
	4.
	5.
Key collaborators, if any	

Individual goal: (continued)

Which higher goal does this align to? <i>If none, why is it important?</i>	
Shared publicly or privately? <i>If privately, why?</i>	
Priority level: high/ medium/low <i>(if "low" - is this a necessary goal?)</i>	
Additional resources needed, if any	
Concerns or potential constraints to achieving this goal, if any	
How might we reward and recognize progress and success?	

Finally, make sure all of your team and team members' goals have been documented and shared with the right people and across the appropriate levels. Also, to increase the impact of the goals, follow our SMARTER recommendations by 1) evaluating and discussing progress frequently, and 2) recognizing and rewarding when individuals and teams hit milestones and success criteria.

