Micro-Training: Goal Management Guide

Learn how the four steps of goal management can support your direct reports' performance and development.

Let's get started!

Use this guide to support performance and development goals

When you're finished learning about the difference between performance and development goals, click on the button at the bottom of the page to learn about TNI's goal management roadmap.
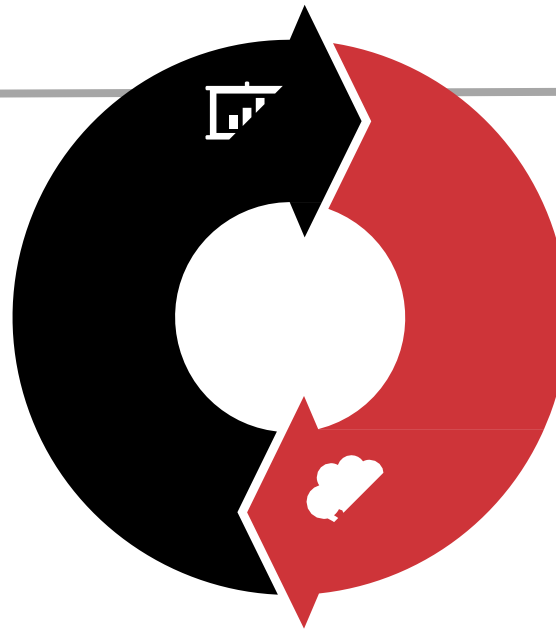
Performance Goals

Help employees:

- Build existing skills.
- Improve performance.
- Challenge themselves to achieve business goals.

Example: Lee's manager has set a goal for her to achieve higher quality scores in the coming year.

Development Goals

Help employees:

- Grow in their current role
- Prepare for the next step in their career

Example: Marco, who works on the factory floor, wants to upgrade his safety training so he can work towards a promotion.
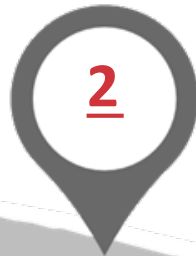
TNI's Goal Management Roadmap

Beginning with "Sourcing Goals," click on each number to learn about the goal management steps. When you've learned about each step, click the button on the bottom right to view a checklist for goal conversations.

Sourcing Goals
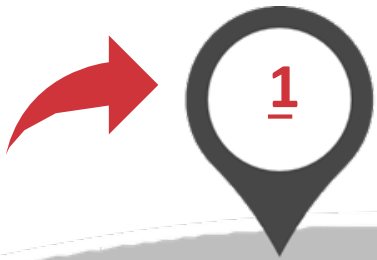
Setting Goals

Achieving Goals

Measuring Goals

1

2

3

4

Source performance goals appropriately

When you've finished learning about sources for performance goals, click the button on the bottom right to learn about sourcing development goals.

Example:

- Employee performance goals should align with organizational goals and directly support departmental and team goals.

- These may cascade down through the organization.

Organizational goal: Cut down on time to process customer orders.

Departmental goal: Reduce time to process orders by 10%.

Individual goal: Reduce time to process orders by 2%.

Source development goals appropriately

When you've finished learning about sources for development goals, click the button on the bottom right to learn about role expectations.

Example:

For development goals, look at:

- Individual development plans

- Past performance reviews

Past performance review suggests employee improve their communication skills.

Development goal: Take formal training on interpersonal communication and receive coaching on writing emails to major stakeholders.

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Make sure goals align with role expectations

When you've finished learning about what role expectations are, click the button on the bottom right to see an example of aligning goals with role expectations.

Role expectations

- The day-to-day activities in a role. Think of what's listed in the job description!

- Communicate what employees are expected to do and how they're expected to do it.

- Record expectations and confirm that employees understand them.

- Goals may capture role expectations, and in certain situations, role expectations may be used instead of goals.
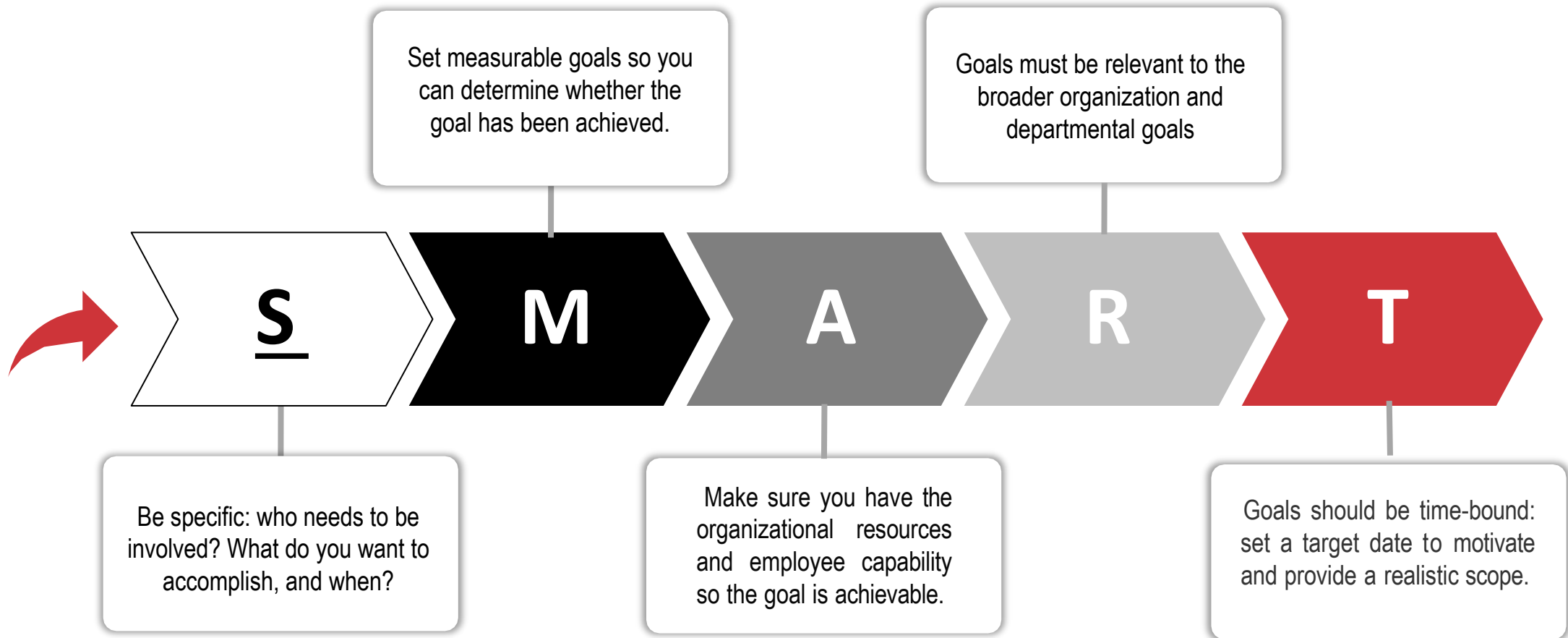
Example: Make sure goals align with role expectations

When you've finished learning about aligning goals with role expectations, click the button on the bottom left to return to the roadmap and learn about setting goals.

Examples:

Role	Expectation	Goal
Project manager	Budget management	Reduce overall spend by 5%
Data entry clerk	Verify data accuracy	Achieve 0.5% error rate or less
Graphic designer	Work on visual social media campaigns	Complete formal training on marketing for Instagram

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Set SMART goals

Set measurable goals so you can determine whether the goal has been achieved.

Goals must be relevant to the broader organization and departmental goals

S **M** **A** **R** **T**

Be specific: who needs to be involved? What do you want to accomplish, and when?

Make sure you have the organizational resources and employee capability so the goal is achievable.

Goals should be time-bound: set a target date to motivate and provide a realistic scope.

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Example: How to create a smart goal

Look at the original goal below and consider what changes you'd make to transform it into a SMART goal. When you've finished your reflection, click on the button at the bottom right to see an example of changes you could make.

> Original goal: "I want to bring in more sales."

How would you change this to be a SMART goal?

- ✓ Specific
- ✓ Measurable
- ✓ Achievable
- ✓ Relevant
- ✓ Time-bound

Example: How to create a smart goal

When you've finished reviewing this example, click on the button at the bottom right to learn about focusing and directing goals.

Original goal: I want to bring in more sales.

SMART goal: "I want to learn and practice new sales techniques this year. My goal is to increase my individual sales from last year by 40%. I want to be at least halfway to my goal by the end of May. To do this, I'm going to apply for a training course on value-based selling next week and should have it completed within the next two months. I've also asked Ella, a teammate who's been here for four years and who broke last year's sales record, to start mentoring me at the end of this month."

Why is this goal SMART?

✓ Specific: The goal specifies how the employee will achieve it and has a narrow focus.

✓ Measurable: The goal is to increase sales by 40%.

✓ Achievable: The goal is realistic within the time frame they've set.

✓ Relevant: Sales are one of the employee's main role expectations, and increasing sales is a team and organizational goal too.

✓ Time-bound: The employee has a timeline for applying for and completing training and for beginning their mentorship with Ella.

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Provide focus and direction for goals

When you've finished learning about how to focus and direct goals, click on the button at the bottom right to learn how to guide goal setting with thoughtful questions.

Set no more than five goals.

Set goals with tight but achievable deadlines.

Set "stretch goals."

Set goals for or with employees.

Record goals with employees.

Prioritize if needed.