

# BEST PRACTICES FOR SETTING AND MANAGING GOALS

## DIFFERENCE BETWEEN WORKPLACE GOALS AND JOB DESCRIPTION

A job description is a static outline of the duties, responsibilities, qualifications and expectations of a specific role. It serves as a foundational reference for understanding the requirements and scope of a position.

Performance and professional development goals bring a job description to life by focusing work on specific measurable targets. Qualities of effective goals:

- ◆ Workplace goals are **dynamic and aspirational objectives** to achieve specific outcomes or performance milestones.
- ◆ Unlike job descriptions, annual goals are **adaptable** and should be **flexible** enough to evolve based on changing priorities, individual growth and organizational needs.
- ◆ Goals are **designed to enhance performance** by fostering continuous improvement that contributes to the employee's professional development.

## BENEFITS OF GOAL SETTING

- ◆ **Clarity and Direction:** Goals provide employees with a clear understanding of what is expected of them, fostering a sense of direction and purpose in their work.
- ◆ **Motivation and Engagement:** Challenging yet achievable goals motivate employees, promoting higher engagement and commitment.
- ◆ **Performance Assessment:** Goals serve as objective benchmarks for a performance assessment, allowing managers to identify areas of improvement and provide targeted feedback.

## KEY PRINCIPLES FOR EFFECTIVE GOAL SETTING

- ◆ **Align Goals at all Levels:** Ensure that individual priorities also contribute to the overall success of the team and the organization.
- ◆ **Use SMART Criteria:** Encourage using SMART criteria (Specific, Measurable, Achievable, Results-oriented, Time-specific) to ensure that goals are well-defined and attainable.
- ◆ **Consider Individual Aspirations:** Employee career aspirations and development goals drive motivation and growth. Identify opportunities for skill development that can occur in the flow of work.
- ◆ **Maintain Regular Communication:** Proactively engage in open and regular communication to discuss progress, address challenges, and provide support.
- ◆ **Ensure a Balanced Workload:** Goals that are achievable given the existing workload can help prevent burnout. Support sustainable performance with equitable distribution of goals across a team.
- ◆ **Set the Right Number of Goals:** The number of goals will vary based on individual roles and responsibilities. Aim for a manageable number that allows employees to prioritize and excel in their key responsibilities. Emphasize quality over quantity. At a minimum, set at least one performance and one professional development goal.



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## BEST PRACTICES FOR GOAL MANAGEMENT

- ◆ **Goal Check-in:** Schedule at least one formal goal check-in meeting to review progress, address challenges, and provide guidance. This promotes ongoing communication and allows for adjustments as needed.
- ◆ **Shared monitoring tool:** Agree on a tool to monitor and record goal progress. This saves time throughout the year. It is also easier to write a self-appraisal and evaluate performance when records are kept up to date.
- ◆ **Create a shared regular check-in document:** Many managers add annual goals to the top of a shared regular check-in document so that they are always visible. The formal goal check-in meeting can be recorded in the same document, making it part of the cadence of continuous feedback and support.
- ◆ **Employee leads the check-ins:** Encourage the employee to lead the check-in meeting. Provide support and feedback and serve as a “thought partner,” as needed.