



Module 4: SMART Goals and Performance Expectations

Goals

Setting a goal isn't always easy. Even when we're committed to change, we can still get caught up in vague ambitions—"I want a promotion" or "I want financial freedom"—while failing to define any specific terms. As a result, our goals become hazy ideas that we never end up reaching. So, how do you break through that pattern and set goals that actually work?

Click on the first lesson below—or the "Start eLearning" button above—when you're ready to begin.



The Method Matters



The Goal Setting Process



Setting SMART Goals



Applying SMART Principles to Performance Expectations



Summary





Knowledge Check

The Method Matters



Reese is an employee who wants to improve her work performance. So, she sets a sensible goal to: *“Be more receptive to feedback.”* But as time goes on, her goal starts to fall flat. Reese doesn’t have a plan. She doesn’t know how much is *“more.”* And she hasn’t defined what *“receptive”* even means.

In this lesson, you’ll learn how to set goals the right way. First, you’ll learn why the method you choose matters and why effective goal setting starts with a process. Then, you’ll learn how to pursue that process and create goals that align with the SMART acronym.





Setting Goals that Actually Work

In this video, we break down goal setting-explaining why the method matters, what process you need to follow, and how to keep goals SMART.


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As much as we might wish otherwise, we can't simply say, *"I want..."* and expect our goals to happen. Imaginative ambitions such as, *"I want to be promoted to firm partner,"* only work if they're rooted in actionable steps. If we don't draw a starting line or explain *how* we plan on getting somewhere, then we set ourselves up for failure.

Simply put, **the method matters.** To accomplish something, we must focus our aim and create a clear path.



Just as a golfer lines up before taking a swing, reaching your goals is about looking at where you are now, where you want to go, and how to carve a path of least resistance. Your method is the path you draw. It's how you get something done—and without it—goals are ineffective.

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Lesson 2 of 6

The Goal Setting Process



Effective Goals Start With a Process

So, how do you set a proper goal? To start, you need to follow a process—one that considers what your top priorities are and how you can reach them. It's a process that moves from broad to narrow, and when followed correctly, it boosts your chances of success.

The Goal-Setting Process

The goal-setting process follows a series of steps that help you formulate compelling, attainable objectives. Click through this interaction to learn what those steps are.

Step 1

Write Down Large-Scale Goals

The first step of the goal-setting process requires thinking about your large-scale ambitions. Ask yourself: *"What do I want?"*

To come up with those wants, consider what you'd like to achieve, create, have, experience, or give. A great place to start is to brainstorm how those wants fit in with your career, finances, education, family, personality, health, enjoyment, and public service goals. For example, maybe you want to *"Quit smoking by next month," "Help a local animal rescue centre,"* or *"Climb to the top of Mount Fuji in Japan."*

During this brainstorming stage, there are no right or wrong answers. Just get your ideas on paper so that you have a broad overview of what you value most.

Step 2

Pick Your Top Goal

Next, take a look at your large-scale goals and pick the one that means the most to you right now. Which goal will get your complete attention?

To help you make that decision, consider what you find most compelling and inspiring. Scroll through your list and ask yourself: *“What will this goal give me, and why is that important?”*

Keep in mind that your top goal should be self-motivating. So, put aside what others want from you and instead focus on what you want. For example, if your friend wants you to help them put on an improv show, but you’re more committed to helping a local animal rescue centre, then be honest with yourself and choose the animal welfare goal.

Tip: Once you’ve found your top goal, spend some time making it as realistic as possible. Consider what it would look like to reach that objective and why that’s worth pursuing.

Step 3

Set Smaller Milestones

Third, once you've chosen your goal, break it down into smaller targets. No matter what you'd like to achieve, chances are you can find some closer checkpoints along the way. And by mapping out those checkpoints, your large-scale goal will become more realistic and attainable.

When mapping out those checkpoints, it's often helpful to think backwards. For example, if you want to raise R40,000 for a local animal rescue centre in three months, consider how much you'll need to raise by months two, three, and one. Now, consider where you are today. How much do you need to crowdfund during this first month if you want to stay on target?

Step 4

Write Out the Steps

Next, once you have your milestones marked, write out the steps it will take to reach them. Writing out these steps will not only give you play-by-play directions, but it'll also provide you with something to check off later. Then, as those checkmarks continue to pile up, you'll see that you're making real progress and will feel motivated to keep going.

So long as you're moving in the right direction, you can keep these steps as small as needed. For example, if you're raising money for an animal rescue centre, you can set steps such as:

1. Handwrite 10 donation request letters a day.
2. Host a fundraising event every other weekend.
3. Skip one restaurant meal per week and put that money toward my donation total.

Step 5

Schedule Ongoing Process Reviews

Finally, once your plan is in place, schedule time to review your process regularly. Ideas don't always work perfectly. While your large-scale goal and smaller milestones might remain the same, you may need to modify the steps you take to get there.

For example, if you planned to host an event every other weekend, but you find that you don't have time, you might need to host one big event a month. Or, maybe you've surpassed your original expectations and can organise several additional events.

Goal setting is an ongoing activity, and to stay on track, you must continually review your process, notice what's working and what isn't, and make adjustments as needed. Schedule these reviews in advance, and those adjustments will feel like opportunities for growth, rather than spotlights on your setbacks.

Summary

Setting effective goals starts by looking at the big picture and writing down your large-scale ambitions. Then, it's about choosing a goal that's important to you, mapping out the milestones along the way, and planning the steps to reach them. It's an ongoing process, and it's most effective when it's reviewed regularly and adjusted as needed.

“A goal properly set is halfway reached.”

Zig Ziglar



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Setting SMART Goals



When following the process, how do you make sure that you're writing out the right goals? The trick is to keep goals SMART, which is an acronym for **specific, measurable, attainable, relevant, and time-bound**.

SMART goals set guiding principles that you can use to ensure that you're creating a powerful goal rooted in reality. When setting these goals, you should be able to check off all of the boxes. Click the '+' to reveal the definitions:





Specific

Is your goal specific and well-defined?

- Goals should be precise and unambiguous.
- Define goals in clear terms, leaving no room for misinterpretation.
- For example, instead of a vague goal like “improve customer service,” a specific goal would be “reduce customer response time by 20%.”



Time-Bound

Does your goal have a deadline? Without a time frame or target date, it's easy to procrastinate on a goal and make excuses.

- Goals should have a deadline.
- For instance, "launch the new website by the end of Q3" provides a clear timeframe.



Measurable

Can you track your goal? If not, how will you know if you're making progress?

- Goals must be quantifiable.
- For instance, "increase sales revenue by R50,000" is more measurable than a generic goal like "boost sales."



Attainable

Is this goal attainable?

- Goals should be challenging yet realistic.
- There must be a balance between ambition and feasibility.
- Unrealistic goals can lead to frustration and disappointment, while overly easy goals may not drive growth.



Relevant

Is this goal relevant to *you* and the organisation? It's easy to fall into the trap of setting goals that look good on paper but don't align with what you really want.

- Goals must align with the organization's overall mission and strategy.
- Ensure that individual goals contribute meaningfully to the bigger picture.

Consider This

Flip the cards below to consider what happens when we turn the following vague goals into SMART goals:

"I want to advance in my career."

SMART Goal: *"Within the next 12 months, I will complete a project management certification (such as PMP) to enhance my qualifications and increase my chances of promotion."*

"I want to get healthier."

SMART Goal:
"Over the next 6 months, I will exercise for at least 30 minutes five days a week and reduce my daily sugar intake to less than 25 grams."



SMART goals put the power of success in your hands. They turn vague ambitions into objectives that you can see, hold, and *ignite*. They're **specific, measurable, and attainable**. They're **relevant** to what you want and **time-bound**. They're resolute answers to the question: *"What do you want to achieve?"*



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Applying SMART Principles to Performance Expectations



Let's delve into the world of SMART goals and how they can significantly impact performance expectations. Imagine you're Jane, a product manager at a mid-sized tech company called Techfirm, Inc. In the past, team-wide goals have often veered off track due to a lack of consensus on the definition of success. But this time, Jane plans to leverage SMART goals to set a clear action plan and stay the course. Expand the accordion below to see some examples.

Specific —

Goals need to be laser-focused. What needs to be accomplished? Who's responsible for it? What steps are required to achieve it? Thinking through these questions helps get to the heart of what you're aiming for.

Here's an example of a specific goal Jane might come up with:

Grow the number of monthly users of Techfirm's mobile app by optimising our app-store listing and creating targeted social media campaigns.

Measurable —

Specificity is a solid start, but quantifying your goals (that is, making sure they're measurable) makes it easier to track progress and know when you've reached the finish line. Jane and her product team want to grow the number of their mobile app users – but by how much? If they get even one new signup, that's technically positive growth – so does that mean they're done? Not quite!

Instead, they could set a measurable goal like this:

Increase the number of monthly active users of Techfirm's mobile app by 20% within the next quarter.

Attainable —

While ambition is admirable, goals must also be realistic. Jane can't expect a 500% increase in app users overnight.

An attainable goal for her team might be:

Achieve a 20% increase in monthly active users by allocating additional resources to user acquisition and retention efforts.

Relevant —

Goals should align with the bigger picture. Jane's team should ask: How does growing the app user base contribute to Techfirm's overall success?

Here's a relevant goal:

Enhance user engagement and drive revenue growth by expanding the mobile app user base.

Time-Bound

Set a deadline. Time-based goals create urgency and encourage efficient time management.

Jane's team could set a time-bound goal like this:

Achieve the 20% increase in monthly active users within the next three months.

Remember, SMART goals and performance expectations enhance clarity, alignment, and productivity within an organisation. By mastering these principles, you can contribute effectively to your teams and overall business success.



Complete the content above before moving on.

Summary



The type of goals you set will influence how well they work. Not all goals are created equal, and the method you choose will make a difference.

To establish effective goals, you'll need to follow a process that moves from broad to narrow. First, that means writing down large-scale goals and picking your top goal from the list. Then, it requires setting smaller milestones to meet along the way to your objective, writing out the steps it will take to reach each one, and scheduling ongoing reviews to ensure that you're prepared if you need to make adjustments.

Then, when writing out those goals, keep them SMART, which is an acronym that stands for *specific, measurable, attainable, relevant, and time-bound*. By following these tips, you can confidently set goals that pave a clear path and point you in the right direction.



Break down your goals. If you feel like your goal is too big to accomplish, continue to break it down into smaller and smaller steps. Remember, everyone has to start somewhere. So, map out all the milestones on the way to your objective until you arrive at the target that's closest to where you are right now. Start small and work your way up, and eventually, those impossible goals won't seem so out of reach.

CONTINUE

Lesson 6 of 6

Knowledge Check



Module 4: Review Question

Question

01/01

Rory owns a small chiropractic business and has a vague goal to *“grow my business.”* But it’s not actionable. So, to improve his success, he’s turned that objective into a SMART goal.

Can you pair each of the SMART initials below to its matching component of Rory’s new goal?

☰ Measurable

I will grow my business by gaining 48 new clients.

☰ Attainable

I will track progress by measuring how many new clients I bring in each month.

☰ Relevant

To reach my goal, I’ll use my marketing skills to launch online ad campaigns.

☰ Time-bound

Gaining new clients will increase profits, boost my reputation, and grow my business.

☰ Specific

I will have one year to reach my goal.