

## SkillTree Learning Lab

### How to Create Individual Strategic Work Goals Using the SMART Goal Tool

#### Introduction

The SMART acronym means:

- Specific
- Measurable
- Attainable
- Resources
- Timeline/Based

This tool will help leaders and employees collaboratively determine what activities drive operational profitability, efficiency, and excellence through strategic work goals.

#### About SMART Goals

SMART goals help employees link their individual work to the organization's strategic goals/directions. For example:

Goal Level	List Goal
Organization	Maintains the highest levels of product quality
Team/Department	Develops an environment where employees are encouraged to seek product quality improvements
Individual	Continually finds practices and methods for improving product quality

#### Hold a Strategic Goal Discovery Meeting

In your next meeting, brainstorm specific organizational, team/department, and individual goals using the template below:

Goal Level	List Goal
Organization	
Team/Department	
Individual	

After each your discovery meeting, leaders and employees can begin developing individual SMART goals linked strategically to the larger organizational goals. Creating these goals enable employees to be strategically focused at all times. What is the benefit? Simple - organizational goals change and SMART Goals change/adjust with them, which means employees are never out of step with new strategic priorities.

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#### SMART Goal Worksheet

<p><b>SPECIFIC</b></p> <p>Insert the individual goal here and consider some of these goal clarifying concepts:</p> <ul style="list-style-type: none"> <li>• <b>Who:</b> Who is involved?</li> <li>• <b>What:</b> What do I want to accomplish?</li> <li>• <b>Where:</b> Identify a location.</li> <li>• <b>When:</b> Establish a time frame.</li> <li>• <b>Which:</b> Identify requirements and constraints.</li> <li>• <b>Why:</b> List specific reasons, purposes or benefits of accomplishing the goal.</li> </ul>	
<p><b>MEASURABLE</b></p> <p>This sets a metric for the leader and employee, so that checkpoints yield a fair assessment of the employee's trend toward success, additional support, or failure. It can be expressed in terms of percentages, fractions, whole numbers, as well as completes or incompletes.</p>	
<p><b>ATTAINABLE</b></p> <p>This is determined by the leader and employee, based on the skills, gifts, talents, and abilities of the employee. The leader has the final say on attainability, and should remain sensitive to reasons an employee may not feel confident or competent in reaching a specified goal.</p>	
<p><b>RESOURCES</b></p> <p>A leader must identify the key resources employees need to get their work done. This includes proper authority, key contacts, time, materials, and even access to subject matter experts. It also includes tangible goods and intangible support (words of encouragement, coaching, etc.)</p>	
<p><b>TIMELINE/BASED</b></p> <p>This anchors an outcome to a specific date and time for regular or one time completion by the employee. Adjust your performance milestones/checkpoints according to your employee's performance level (Top 10%, Middle 50%, Lower 30%, or Bottom 10%)</p>	

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#### SMART Discussion Log

This form helps leaders and employees capture:

- Goal-related discussions
- Goals met or unmet
- Performance challenges and collaborative solutions
- Changing responsibilities (closing out an existing goal)
- Coaching needs and outcomes

<b>Meeting Date:</b>	<b>Time:</b>
<b>Individual Goal:</b>	
<b>1. Is the employee meeting their current SMART Goal? Y or N (circle one)</b> <b>If "Y", go to #2. If "N", go to #3</b>	
<b>2. What is the organizational, department/team, individual impact of the employee meeting their SMART goal?</b>	
<b>3. If the SMART goal is unmet, what is the employee's solution for meeting their goal? What new checkpoints, resources, or other support measures can be provided by the leader?</b>	
<b>4. Coaching follow-up action and date:</b>	
<b>Print Leader's name:</b> _____ <b>Leader initials:</b> _____ <b>Date:</b> _____	
<b>Print Employee's name:</b> _____ <b>Employee initials:</b> _____ <b>Date:</b> _____	
<input type="checkbox"/> <b>Employee declines or disagrees with the information above (Contact your One-Over/HR Representative)</b>	

\*Note: This document is created each time a scheduled delegation or coaching event occurs.

\*\*Note: Please refer to your delegation and coaching tool cards for tips on meeting with your employee