



## GOAL SETTING GUIDE



lead. learn. change. thrive!

## Purpose

Enable you to SET Result-oriented Goals that help you accomplish your most important objectives both at work and in other aspects of your life.

## Outcomes

### **You will:**

- SET 3-5 Result-oriented Goals that are important to you
- Build a Visible Scorecard that tracks progress toward your goals
- Identify the Performance Drivers (behaviors, actions, decisions, etc.) that enable you to achieve your goals
- Establish and Execute a personal Follow-up/Follow-through process that generates learning and keeps you on track for achieving your goals

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## Step 1: SET Result-Oriented Goals

Most of us are horrible at setting goals. We often have many things we want to accomplish...

- At work, it might be improve sales, improve quality, drive down costs, improve the bench-strength and capabilities of the organization, earn more money, get promoted.
- At home, it might be lose weight, prepare for retirement, save for a new house or condo or that really great vacation to Tuscany or Tahiti.

*"All my life, I've wanted to be somebody. Now I wish I had been more specific."*

Lily Tomlin  
In Search of  
Intelligent Life  
in the Universe

...yet, incredibly few people set goals that enable them to accomplish those things.

A Harvard study of their MBA students suggested that only 16% of us set goals. Only 3% then create plans to achieve those goals.

Other studies have suggested a larger percentage of people may set goals, but a much smaller percentage work on them for even two weeks before dropping them. That clearly explains why new gym memberships explode the first week of January, but most people stop working out by early February!

Even when people say they have goals, they are more likely to be:

- Too broad or ambiguous to be effective – e.g., “Lose weight,” “Save money,” or “Sell more.” We call those “goal categories” not goals.
- Defined as activities to be completed – “Work-out” - not goals to be accomplished, e.g., “improve my maximum bench-press from 150 to 200 pounds.” So, they go through the motions and feel like they are working hard but generating limited results.

Effective Goals:

### 1. Focus on Results, not Activities

When people do have “goals,” they often define them in terms of activities (what they DO) rather than results (what they want to ACCOMPLISH). This often leads to a lot of activity, without actually accomplishing anything. For instance, many salespeople have goals to “make X number of sales calls per week.” That can lead to a lot of activity, without improvement in actual unit sales, revenues or profits. A better, Result-oriented Goal might be: “grow sales in my territory from 100,000 units to 120,000 units during the second quarter.” The salesperson will still have to make sales calls. But, now, those calls are more likely to be oriented to those customers and products that are most likely to produce the desired Result.

## 2. Defined by SET (Start, End, Timeframe)

To drive action, goals are best described by the acronym SET (Start-End-Timeframe). Knowing the end target is obviously essential. The point help defines how big the hill is to climb to accomplish the goal. The Timeframe is vital. The adage “a goal without a timeframe is just a wish” rings true...the Timeframe creates a sense of focus and urgency.

## 3. Stretch the Organization

When setting goals, people often anchor their expectations to current levels of performance rather than what's possible. For instance, people thought it was impossible for a human to run a mile in less than four minutes. In 1954, Roger Bannister ran the mile in 3:59.4. Within three years, 16 other runners also cracked that mythical four-minute barrier. Stretch goals require the organization to envision what's possible rather than incrementally improve on the past. Disruptors – such as Amazon or Uber or Tesla– challenge the fundamental underlying assumptions of whole industries. In the right situations, well-set Stretch goals force individuals or organizations to essentially disrupt themselves. It pushes them outside their comfort zone and enables them to accomplish much more than they originally thought possible.

## Exercise: SET Your Goals

Define your goals in SET Format. Pick one or two areas in which it would be helpful for you to SET goals for the results you want to achieve (e.g., Work, Personal life, Soccer Coach, a church group, etc.). For each area you choose, identify your top 3 to 5 Goals. List below the category, the Starting Point, the Ending Point (your goal) and the Timeframe in which you want to accomplish the goal. Use extra sheets of paper if you want to set goals in multiple areas.

GOAL	START	END	TIME FRAME
<i>Example: I will lose weight...</i>	<i>From 180</i>	<i>To 175 pounds</i>	<i>By December 31.</i>
1			
2			
3			
4			
5			

See more SET Result-oriented Goals examples at [www.wwici.com](http://www.wwici.com)

## Step 2: Build Your Scorecard

*The old adage rings true... "What gets measured, gets done." Good scorecards are critical to achieving the goals you set.*

### 1. Good Scorecards:

Create a direct line of sight between performance and results...

This allows you to see if the effort you are putting into achieving your Goal is leading to the results you want.

...Are visible and available for review while the game is being played...

This allows you to change your performance in time to hit the Goal within the Time frame you set:

Let's say you set a goal to lose 10 pounds in two months (a pretty achievable goal for most people). Most experts would suggest that you need to weigh yourself weekly to check your progress and make adjustments. If you only weigh-in at the end of every month, you might find after that first month that you're not on pace with where you need to be...that might keep you from hitting the goal. You wouldn't be able to change your behavior enough to make up for the time you lost that first month. Weighing in weekly allows you to see whether you are on-track or off-track within enough time to make the necessary adjustments to *alter the outcome of the game while it's still being played*.

...Are Data Driven!

We once asked the Production Manager of a company with a significant quality issue that was causing customer dissatisfaction, "How quality was today?" His response, "Pretty good." Neither of us learned anything from that response. Once his organization began to measure quality quantitatively (e.g., what percentage of good quality product they produced each day), their product quality began to improve quickly. Basing your Scorecard on quantitative information is best (units sold, revenue generated, cost per unit produced), but Qualitative information (Customer loyalty, team member engagement, etc.) can work.

### 2. Better Scorecards provide comparisons between Current Performance, your Best-ever Performance and your Goal:

This helps create meaning and context for the data. If the production manager in the above example says, "Our product quality today was 75% good with no defects, our Goal is 85% and our Best-ever Performance was 87%, you have an excellent picture of the performance for the day.

### 3. Best Scorecards show trends:

Looking at trends provides even more meaning to your Scorecard. Trends allow you to see whether performance is getting better or worse. This, in turn, allows you to begin to diagnose the causes of any changes. Trends also allow you to compare different items to see how they might impact each other.

## Exercise: Build Your Scorecard

1. Refer back to the Goals you set.
2. For each of those Goals, identify measures that:
  - a. provide a direct line of sight between performance and results, and
  - b. will be visible and available while the game is being played
3. For each measure, identify the Frequency by which you want to collect the data so that it will be relevant and timely enough to allow you to *alter the outcome of the game while it is still being played*.

Goal	Measure	Frequency (e.g., Hourly, Daily, Weekly, Monthly, etc.)
1:		
2:		
3:		
4:		
5:		

## Step 3: Define the Performance Drivers

Performance Drivers are the specific projects, activities, tasks, behaviors or actions that move the dial on your scorecard and help you achieve your goals

They are what you actually DO to accomplish your Goals.

*“The true definition of insanity is doing the same thing over and over again and expecting different results.”*

Albert Einstein

### Common Performance Drivers

#### **Lose weight**

For someone who wants to lose weight, the two most common Performance Drivers are:

- Manage what they eat every day to a certain number of calories or food points.
- Exercise for a certain amount of time and intensity 3 or 4 or 5 days per week.

#### **Sales**

For a salesperson who wants to sell more, common Performance Drivers are:

- Analyze the territory to identify who the best potential customers are
- Prospect effectively – find out how to get a “warm” introduction to the prospective customers
- Carefully prepare for each sales call (set a goal for each call; identify what questions you’ll ask to learn as much as possible about the customers’ needs and choice factors, etc.).

#### **Safety**

To improve safety in any environment, one of the most common Performance Drivers is to wear the appropriate Personal Protective Equipment (PPE).

Performance Drivers can often be identified by identifying great performers and understanding what they do differently than others. Once identified, the capability to effectively perform can be honed through Purposeful Practice.

#### **To be effective, Performance Drivers...**

- MUST be trackable so you can understand the correlation and chart improvement
- Often change over time as you better understand what drives results or as you adjust to take performance to a higher level
- Provide the basis for much coaching (especially “in the moment” or “in the game”)



## Exercise: Define your Performance Drivers

1. List your 3 to 5 most important Goals.
2. For each Goal, brainstorm as many actions or tasks as possible that you could do to achieve the Goal.
3. Go back through your lists and circle or highlight the 1-3 tasks or actions that are most likely to lead to the actual results. Write those in the space below.
4. Identify how you will track execution of your Performance Drivers.

Goal	Performance Drivers	Track
1:		
2:		
3:		
4:		
5:		

## Step 4: Create Follow-up/Follow-through

Follow-up/Follow-through is critical to achieving the results you want. When thinking about an individual goal, Follow-up/Follow-through means setting a specific time frame in which you will monitor progress, understand any gaps between your results and the results you want to achieve and then making adjustments to stay or get back on track. You may choose to do that daily, weekly, monthly or even quarterly...whatever works best for your goals and helps you stay on track.

*“Follow-up/Follow-through is the most important step in the process...and we stink at it!”*

While consistent Follow-up/Follow-through helps you be accountable to yourself for your efforts, it also provides a great learning opportunity. It helps you identify what you are doing well that is allowing you to achieve your goals and/or what you could change to improve your results.

It is often helpful to find an “accountability partner” to help you with Follow-up/Follow-through. They can help you stay on track, and you can help them stay on track with their goals.

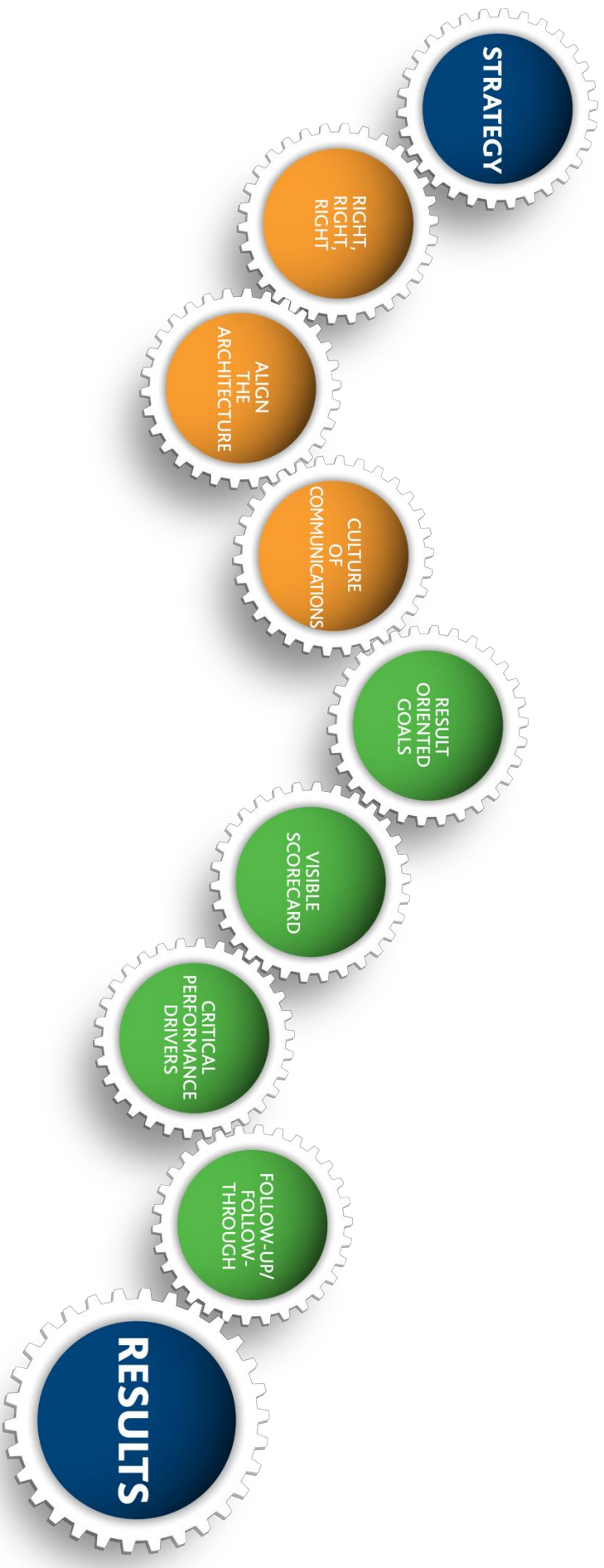
**Effective Follow-up/Follow-through: 5 Questions in 5 Minutes that help you stay on track:**

1. What are your top 3 goals?
2. What were the results (for the last week, month, quarter)?
3. What did you do during the last (week, month, quarter) relative to those goals?
4. What caused any gaps?
5. What is your plan for the next (week, month, quarter)?



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**SXR™ Framework**



**3 Environment Gears**

**4 Performance Gears**



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