Goal Setting For Success

INSTRUCTOR GUIDE

4-HOUR COURSE

HRDQ®

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Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience

- Library research

- Online research

- Customer research (focus groups, surveys, etc.)

- Subject Matter Experts (SME)

- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training

- Meaningfulness — connects the topic to the students' past, present, and future

- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn

- Modeling techniques — demonstrate to students how to act and solve problems

- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation

- Consistency — creates consistent instructions and design to help students learn and retain new information

- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Chapter One: The Achievable, Believable Goal

Type of Activity	Segment	Time
Group Activity	Trashcan activity	15
Written Exercise	Mission statement	5
Group Activity	SWOT analysis	10
Written Exercise	Extracting goals	10
Facilitate	Prioritizing goals	10
Written Exercise	Prioritize your goals	10
Facilitate	Common mistakes	5
Written Exercise	Goal pyramid activity	10

Course timing

Chapter Two: Creating a Strategy

Type of Activity	Segment	Time
Facilitate	Outcomes vs. activities	5
Facilitate	Planning to plan	5
Group Activity	Measuring success	10
Written Exercise	Measuring success matrix	10
Written Exercise	Writing measurable objectives	10
Facilitate	Goal thinking in detail	10
Written Exercise	Writing SMART goals	15

Course timing

Chapter Three: Implementing Your Goals

Type of Activity	Segment	Time
Facilitation	Converting strategies to action	10
Facilitation	Goal action plan	5
Group Exercise	Writing a goal action plan	10
Facilitation	Team roles worksheet	5
Written Exercise	Your team role	10
Facilitation	Obstacle spreadsheet	5
Facilitation	Cultivating a support system	5
Facilitation	Communicating with stakeholders	5
Facilitation	Monitoring progress	10
Facilitation	Core strategy changes	5
Group Activity	Goal implementation simulation	50

Contents

Course objectives

Successful completion of this course will increase your knowledge and ability to:

◊ Understand what makes a goal attainable
◊ Discover your strengths, weaknesses, opportunities, and threats when setting goals
◊ Avoid common mistakes when creating achievable goals
◊ Identify an outcome strategy
◊ Develop a matrix for measurable success
◊ Practice writing measurable objectives
◊ Set your goals into action
◊ Monitor your progress
◊ Deal with changes in goals

Chapter **One**

THE ACHIEVABLE, BELIEVABLE GOAL

Learning objectives

Successful completion of this chapter will increase your knowledge and ability to:

◊   Understand what makes a goal attainable
◊   Discover your strengths, weaknesses, opportunities, and threats when setting goals
◊   Avoid common mistakes when identifying achievable goals

Mission statement and SWOT

A Starting Point for Identifying Achievable Goals
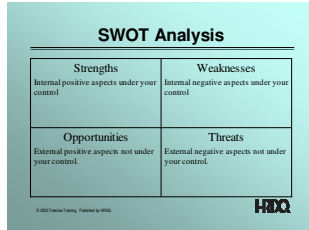
Write your company's mission statement here_____

_____

Strengths	Weaknesses
Internal positive aspects that are under control and upon which you can capitalize ◊ What do you do well? ◊ What are your inherent strengths? ◊ What are your core skills or competencies? ◊ What are your advantages ◊ What are your major accomplishments?	Internal negative aspects that are under your control and that you can improve upon ◊ What could you improve upon? ◊ What do you do badly? ◊ What do you avoid doing? ◊ What should you avoid doing? ◊ What professional weaknesses hold you back?
Opportunities	**Threats**
Positive external conditions that you don't control but can take advantage of ◊ What economic trends are creating more opportunities locally or globally ◊ What changes in technology can you take advantage of? ◊ What government policies are related to your industry? ◊ What cultural or social changes are creating opportunities?	Negative external conditions that you don't control but can minimize the effects of ◊ What obstacles are you facing in the environment? (Economic trends, government regulations, labor market conditions, etc.) ◊ What market trends affect you? (Demand, competition, industry changes) ◊ Is changing technology a threat?

Good goal setting starts with an organizational, departmental, team, or personal mission statement.

The mission statement governs goals and specifies an overall strategy. A good mission statement explains your reason for being, provides a general sense of direction, and identifies what you stand for. Keeping your mission in mind will help you complete a SWOT analysis that's focused and realistic.

The SWOT Analysis is a key tool businesses use in the strategic planning process, and it can also be applied in the initial phase of goal setting. Mention to participants that this time-tested tool is a very effective way of identifying internal Strengths and Weaknesses and of examining the external Opportunities and Threats you face in accomplishing your mission. Carrying out an analysis using the SWOT framework will help you focus on the areas where you're strong, ferret-out where the greatest opportunities lie, and begin the process of building achievable, believable goals.

Form work groups of 3–5 people and give participants time to work on the SWOT analysis for their department or team.

SWOT Analysis

Strengths	Weaknesses
Internal positive aspects under your control	Internal negative aspects under your control
Opportunities	Threats
External positive aspects not under your control.	External negative aspects not under your control.

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SWOT Analysis Exercise

Use the questions from the previous page to develop your SWOT analysis

Strengths	Weaknesses
Internal positive aspects that are under your control, upon which you can capitalize ◊ ◊ ◊ ◊ ◊ ◊ ◊	Internal negative aspects that are under your control, upon which you can improve upon ◊ ◊ ◊ ◊ ◊ ◊ ◊
Opportunities	**Threats**
Positive external conditions that you don't control but can take advantage of ◊ ◊ ◊ ◊ ◊ ◊ ◊	Negative external conditions that you don't control but can minimize the effects of ◊ ◊ ◊ ◊ ◊ ◊ ◊

Extracting goals from your SWOT

After completing your SWOT analysis, you will have a starting point for developing your goals. Ask yourself the following questions that relate to you SWOT analysis:

How can you capitalize on your strengths?

_____

_____

_____

What must be done to minimize your weaknesses?

_____

_____

_____

How can you take advantage of the opportunities that lie ahead?

_____

_____

_____

What can you do to avoid or lessen threats?

_____

_____

_____

The information from your SWOT analysis and the answers to these questions are the core areas of for your goals.

> The best way to predict your future is to create it.
> — Stephen R. Covey

Extracting goals from the SWOT is an important step in developing goals. It's not safe to assume that the results of the SWOT yield pure goals. While you may find a weakness in your team or organization, there may not be an achievable goal that can be developed to offset that weakness.

Remind participants that this is simply the goal identification phase. In this phase it's not important to have all the details that will be necessary in the goal development phase, which comes later. The object of the goal identification phase is to determine where an individual or business wants to be in one, five, or ten years. This is a process of setting a direction for the future. The specific steps of going in that direction will be developed later.

Extracting Goals from SWOT

- How can you capitalize on strengths?
- What must be done to minimize weaknesses?
- How can you take advantage of opportunities that lie ahead?
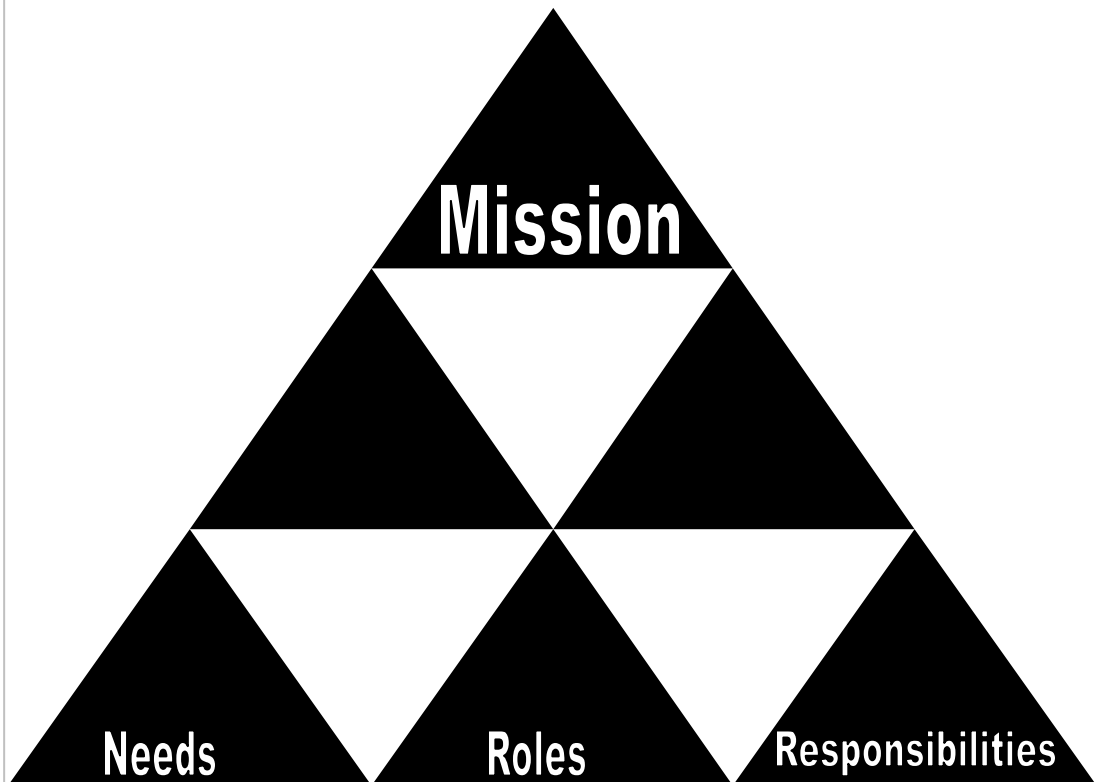- What can you do to avoid or lessen threats?

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Prioritizing your goals

You can prioritize your goals by first examining what the motivation is behind them and then ensuring that your goals contribute to the fulfillment of your mission. There are three primary motivators to examine when prioritizing goals:

- ◊ Needs
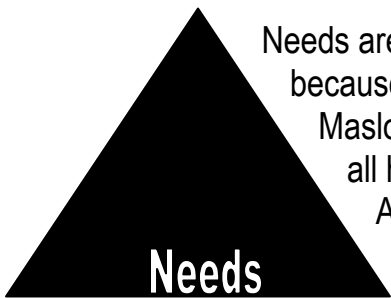- ◊ Roles
- ◊ Responsibilities

Basis for Prioritizing Goals

Prioritizing your goals

When prioritizing your goals, ask yourself three questions:

Question #1*: Is this goal something that's related to a need or a desire?*

Needs are natural starting points for prioritizing goals because they relate to our survival activities. Remember Maslow's Hierarchy? In addition to Basic Survival, we all have the need for Safety, Love, Worth, and Self-Actualization. When one level is satisfied, we're motivated to achieve a higher level of need—we develop a desire to achieve the goal.

Needs

Question #2*: Is this goal associated with a primary role?*

Every department, team, and individual has a role; however, those roles may differ from setting to setting. For example, your organization may play an entirely different role in the local community than it does in the global market. Your team's role in marketing may be small or non-existent; however, your role in finance may be huge.
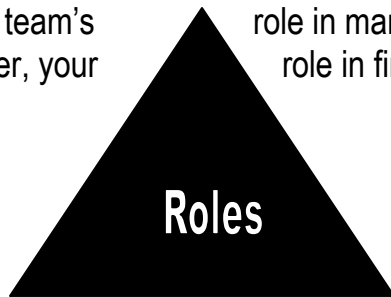
Roles

Question #3: Is this goal associated with specific responsibilities that result from defined roles?

Defined roles have specific responsibilities and obligations associated with them.   These responsibilities require taking action when needed and completing the steps necessary to fulfill obligations. Responsibilities represent those areas for which you are held accountable for your conduct and actions.

Responsibilities

Emphasize the importance of each of these areas:

Needs: People have a natural tendency to work harder to reach a goal that satisfies an unfulfilled need; hence these goals quickly become a priority. Whether it's personal or professional, goals developed around critical needs can provide strong motivation in energizing our behaviors toward accomplishment.

Roles: Point out that few goals are based entirely on needs. Therefore, examining how—or if—your goals relate to your primary role is a valuable exercise in identifying the priority of your goals.

Responsibilities: Many goals are generated from responsibilities to others, the organization, or to oneself.

Prioritizing Your Goals

Exercise—Prioritizing Goals

Using the goals you extracted from the SWOT activity, prioritize your goals accordingly. If a goal is related to a need, role, and responsibility, place a check in each of those boxes and write the goal in the "High Priority" box.

GOAL	Need	Primary Role	Specific Responsibilities
High Priority (related to all three areas)			
Mid-Level Priority (related to two of the three areas)			
Low Priority (related to only one of the three areas)			

Use the following examples for the prioritizing exercise:

Assume you're the customer service manager and you've been losing customers during the past year due to poor service. If your goal is to implement a standardized process for handling customer complaints, this is a high-priority goal because it's related to a need (keeping customers), it's associated with your primary role (customer service manager), and it's a primary responsibility (area for which you'll be held accountable for your actions).

In contrast, if you're the customer service manager, and the sales manager asks for your assistance in developing a new marketing plan, this may be a low priority goal because it's not necessarily associated with your needs, and it's not associated with your specific responsibilities. However, as a manager, it may be part of your primary role to be cooperative and supportive to managers of other areas.

Common goal-making mistakes

Conflicting Goals

In most cases, a goal cannot and should not directly contradict any of your other goals. You can avoid goal conflict by asking yourself a few simple questions:

◊   Does this goal *align* with the mission?
◊   Does this goal compete for any of the resources required for the successful completion of other goals?
◊   Does successful completion of this goal prohibit the successful completion of any other goals?

"Wantism" Rather than Realism

Realistic goals are practical and possible. They are achievable and believable: a balance between challenge and ease, between effort, and probability. Ask yourself:

◊   Is this goal based on the realty that something can or should happen versus simply "wanting" it to happen?
◊   Is there a logical, rational reason for setting this goal?

Too High/Too Low

Finally, a realistic goal involves some "reach" "flex" "stretch" or "growth" but not so much so that an individual finds it demoralizing, defeating, and demotivating. Check your goal by asking:

◊   Is this goal based on consistency of performance?
◊   Does this goal encourage some stretch?

Goal pyramid activity

You should set goals so that they are slightly out of your immediate grasp, but not so far that there is no hope of achieving them: no one will put serious effort into achieving a goal that they believe is unrealistic.

Use the 3-step Goal Pyramid to ensure that your goals are achievable and believable.

Step 1   Transfer goals from your SWOT analysis to the pyramid

Step 2   Prioritize goals based on needs, roles, and responsibilities

Step 3   Avoid common mistakes by ensuring your goals are realistic and aligned with the mission.
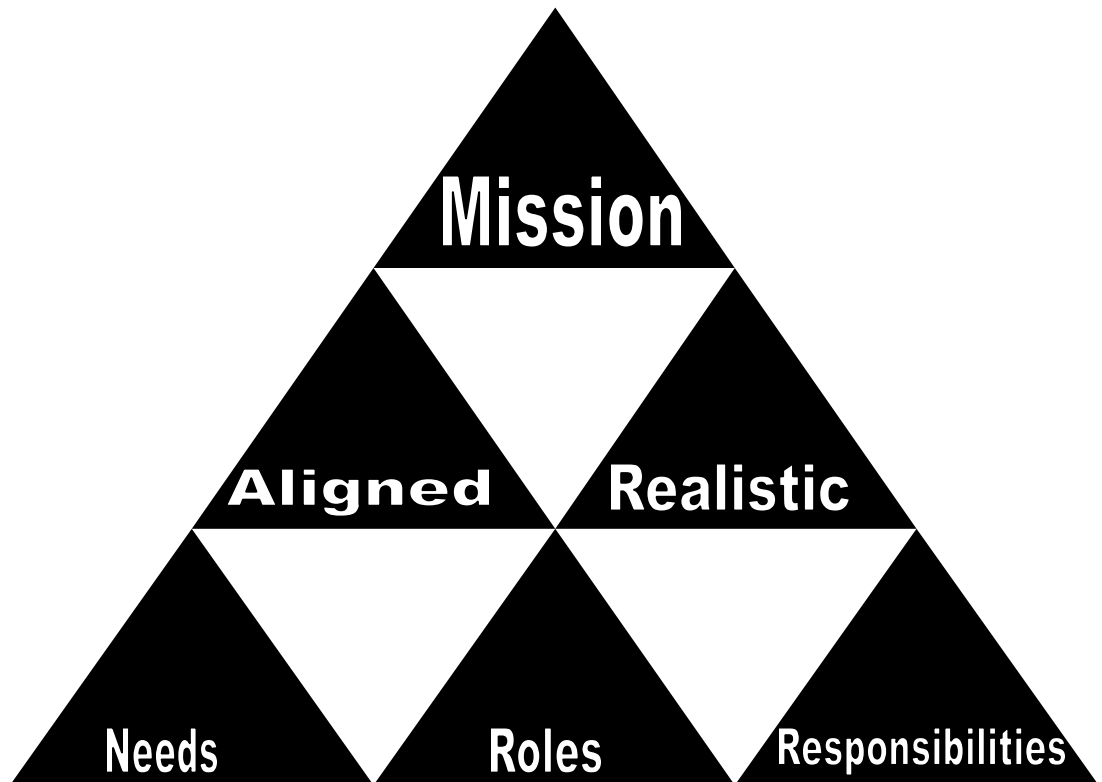
> Before taking steps, the wise man knows the object and end of his journey.
> — W.E.B. DuBois