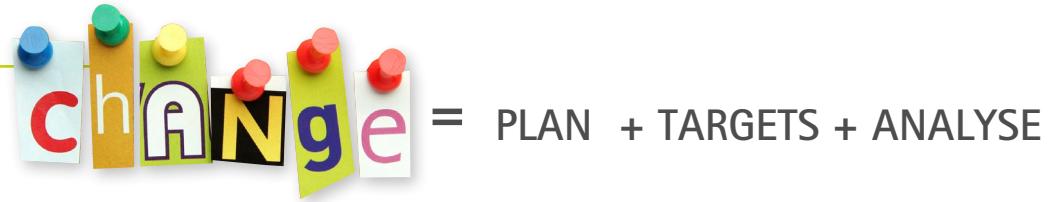


# A Guide to MEASURING Social Impact



A step by step introduction to  
defining and measuring the social  
impact of an organisation

[www.economicchange.co.uk](http://www.economicchange.co.uk)



This guide offers a step by step introduction to defining and measuring the social impact of an organisation. It offers insight into applying a simple process to develop a social impact framework for an organisation. The process can be applied at a macro to micro level, to ultimately measure the impact of your organisation.

The Guide has been written by Heather Black, Managing Director of Economic Change CIC. As a research consultant, Heather has helped to develop social impact frameworks and conducted independent evaluations since 2000 for national to local organisations with a social and economic mission. Heather is renowned for her work having won a number of awards, and she is a nominated Council Member of Social Enterprise UK.

#### ECONOMIC CHANGE CIC OFFERS TRAINING AND CONSULTANCY SERVICES TO HELP ORGANISATIONS:

- Develop a social impact framework
- Design evaluation processes
- Customise Salesforce CRM to manage customer relationships, measure impact and a range of other business functions
- Undertake independent evaluations of services.

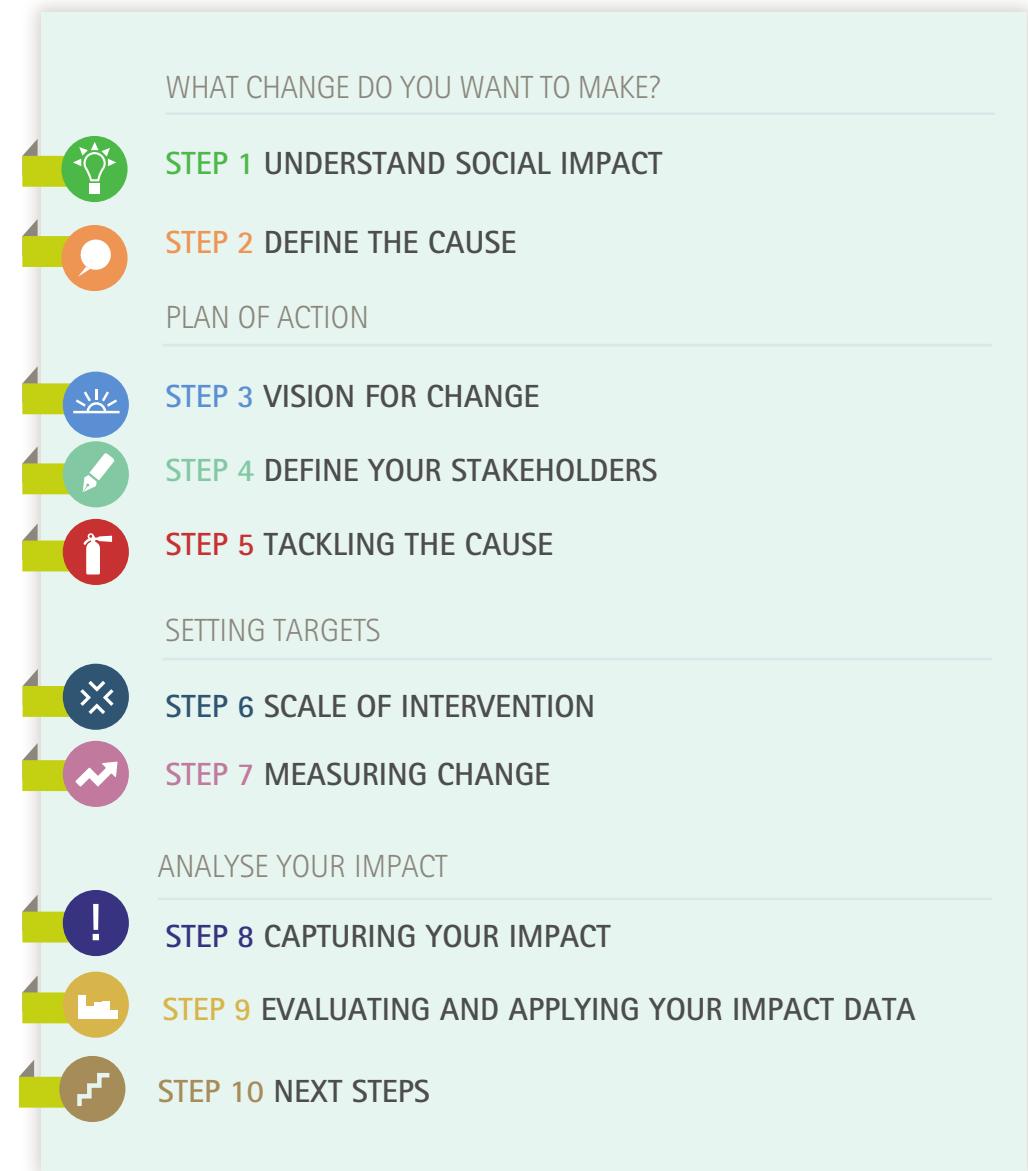
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STEP 1

## UNDERSTAND SOCIAL IMPACT

The rational to understand and measure 'Social Impact' is applicable to all organisations and can be considered in different ways depending on your outlook and business model. All of the reasons below could be applied and integrated into everyday business practices. With this in mind, social impact should not be viewed in isolation to other business functions.

### Customer satisfaction

Are your services meeting the needs of your customer? This principle should be at the core of any organisation. If you are focussed on helping clients to overcome their problems, then assessing whether you are actually solving their problems should be integral to what you do.

### Core Mission

Your organisation may have been set up to achieve a primary goal of having a social impact and tackling a cause that is important to the founder or stakeholders.

### Social Responsibility

Is your organisation managing its impact on a range of social, economic or environmental issues? Increasingly consumers are looking to purchase from an organisation that is ethical and operates sustainable business practices.

### Key Performance Indicators

If you are running an organisation that aims to achieve a social impact through your core service offering, it is likely that you will have related key performance indicators, which tie into different business functions from finance, sales, to marketing.



#### 1) Customer Satisfaction

Developing and managing relationships with customers in today's business world is essential and it is expected that you engage with customers in a 'social' way using all channels of communication.

A happy customer results in word of mouth referrals, reputation development, and management satisfaction, in knowing that the organisation is delivering what it set out to achieve. It is important to capture and review customer satisfaction through a set of key performance indicators and business processes supported by a robust Client Relationship Management system. This will give you the opportunity to review customer satisfaction in real-time and address any issues or failures in the services being provided.

#### 2) Core Mission

An organisation may be set up to tackle one or more 'cause(s)' as its core mission, as defined by the founder(s).

A 'cause' can either be a social, environmental or economic issue that needs to be tackled to improve well-being amongst the population and the world. A 'cause' for example could be

- Tackling Low Literacy Grades amongst School Leavers
- Supporting ex-offenders back into employment.

#### 3) Social Responsibility

Organisations are taking steps to manage their social, economic and environmental impact as part of their every day operations and business practices in the following areas:

- Environment and Ecology
- Health and Wellbeing
- Diversity and Human Rights
- Community Responsibilities



#### 4) Key Performance Indicators

If your organisation is involved in providing services to customers which result in a social impact then there will be a number of key performance indicators that span a range of business departments.

#### As an example:

Customer Service – Any organisation should assess and evaluate the satisfaction of their clients in the service they have received, as detailed above.

Marketing – Outreach and brand awareness amongst your target client market is essential to engage clients. You may also have support sections on your website that assist clients virtually. You can review your website statistics, newsletter subscribers or no of enquiries for example, to assess your potential impact of reaching and/or supporting your target audience.

Sales – Are your enquiries turning into clients? It is important to send out the right message about what you offer and assessing whether your potential and existing customer's expectations are being met when they contact the organisation.

Financial – If you are delivering contracts, you may need to achieve a certain level of social impact to earn sufficient finance for the organisation. What is the price point of your different services and does it financially make sense to run them in return for the social impact it is creating? This helps to assess the social return on investment for funders and reviews the sustainability of your services as part of your business strategy.

#### Reasons to Measure your Impact

An organisation may choose to define and measure its social impact for the following reasons:

- It evaluates the performance of the organisation in meeting the needs of customers and provides assurance to the management team and employees that they are achieving what they set out to do.
- It allows an organisation to assess if it is investing its resources wisely to maximise its impact and ensure sustainability.
- It helps the organisation to demonstrate its success at delivering a particular service and tackling a 'cause' when bidding for new funding or contracts.
- It provides accountability to key stakeholders e.g. clients, funders or investors as it demonstrates what you have actually achieved using the investment they have provided.
- It demonstrates the overall impact of the organisation, which can increase its reputation and profile amongst the media, clients, partners or investors.
- It demonstrates best practice within a particular sector or industry to showcase the impact certain services can achieve in tackling a 'cause'.

#### CHECKLIST

- ✓ Is there an understanding on what social impact is and how it is important to the organisation?
- ✓ Do you have the management team buy-in across relevant business departments?



## STEP 2 DEFINE THE CAUSE



A 'cause' is a social, environmental or economic issue that needs to be tackled to improve well-being amongst the population and the world.

A 'cause' for example could be:

- Tackling Low Literacy Grades amongst School Leavers
- Reducing the use of landfill sites

Your organisation may have one primary cause or a number of causes that you are trying to tackle.

### Demonstrating the Cause

To showcase the importance of the 'cause', it is useful to gather statistical evidence to demonstrate the issues and negative impact being caused by this problem. It is very likely that you will need to use this statistical data to raise awareness and educate your different audiences about the 'cause', to attract attention and support. If you cannot find up to date statistics it may be worth undertaking your own in-depth research to produce your own statistics. You might find a suitable funder or sponsor for a research brief, or you could approach a university research department who could potentially access funding from Higher Education Research Bodies.



### Case Study Example

Throughout this Guide, we are looking at tackling low literacy levels as an example case study.

#### The Cause as defined by National Statistics

'One in six people in the UK struggle with literacy.' (Source DfES (2003) Skills for Life)

'In 2007, only 35% of five year olds in the most deprived areas reached the expected level of attainment, compared to 51% of pupils in other areas. (Deprivation and education: the evidence on pupils in England, Foundation Stage to Key Stage 4, Schools analysis and research division, Department for Children, Schools and Families, March 2009, p28-32)

#### National to Local Scale Statistics

'Key Stage 4 - age sixteen - % of pupils achieving grades A\*-C in 2007/2008

English 61% (69% for girls, 54% for boys). Only 21% of disadvantaged pupils achieved 5+ A\*-C GCSEs including English and maths in 2007 compared to 49% of non FSM pupils.' (Statistical first release: GCSE and equivalent in England, Department for Children, Schools and Families, Oct 2008)

### CHECKLIST

- ✓ Do you have a clear definition of the 'cause'(s) your organisation is focussed on tackling?
- ✓ Can you clearly communicate the challenges or problems you are trying to tackle?
- ✓ Do you have statistics that demonstrate the importance of the cause(s) you are trying to tackle?
- ✓ Are these statistics from valid sources and can you reference them with confidence?
- ✓ Can you use these statistics as benchmarks against which you can measure the impact of your intervention?
- ✓ If your organisation works at an international, national, regional or local level, can you access statistics that can be broken down and compared at each geographical level? e.g. GCSE results as shown in example below. This can be valuable when justifying your reasons for focusing resources in certain areas and/or assessing the impact of intervention in a local area.

### STEP 3 VISION FOR CHANGE

The Aim of your organisation is to communicate what your organisation does. It is an explanation of your vision and the overall change that you want to achieve towards tackling the 'cause'.

Your aim should be one sentence, within which it captures the issue, the outcome/change you want to make, the target audience and a geographical area and time frame if applicable. If you tackle more than one cause or support more than one type of beneficiary you might have more than one aim.

#### Case Study Example

##### Aim of the Organisation

'To help improve literacy levels amongst 11 – 16 yr olds in London.'

To demonstrate the point let's break this down:

The change you want to make:- Improve literacy levels

Target Audience and Geography: - 11-16 year olds in London

Exercise

Describe your aim in Appendix A

#### CHECKLIST

- Have you defined your aim(s) of the organisation?
- Does your aim demonstrate the change you want to make?
- Are your aims measurable i.e. will you be able to demonstrate that you can achieve them?
- Can each of your services or interventions link into these aims i.e. do your services tackle the vision. Each of your services/interventions should be able to demonstrate how it is contributing to your organisation's overall vision and aim(s).

## STEP 4 DEFINE YOUR STAKEHOLDERS

Who are your stakeholders and what do you want to say to them?

Reflect on your aims and identify which aims and potential outcomes will be important to whom. There is likely to be overlap between your stakeholders and the messages you want to convey.

### Case Study Example

#### Different stakeholders and what you might say to them.

##### Schools

We can help you improve the GCSE grades of your students by improving their literacy skills.

##### Young People

We can help you achieve better GCSE grades and achieve your potential in life and work.

##### Public Sector

We can improve educational attainment levels and employability skills of young people in your area

Exercise

Who are your stakeholders and what do you want to say to them?



Q&Q

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## STEP 5 TACKLING THE CAUSE

The Objectives of your organisation detail how your organisation will achieve your Aim. Your objectives are a list of activities you plan to deliver to tackle the problems associated with the defined cause.

It can be useful to demonstrate why you have chosen these specific services or activities. Is their research or statistics proving these activities are the most effective method of tackling the problem. In due course your own social impact evaluation data will hopefully give you some of these statistics.



### Case Study Example

Aim - 'To help improve literacy levels amongst 11 – 16 yr olds in London.'

#### Objectives

- To establish a Young Writers Club in schools to develop the talent of young writers
- To operate a Mobile Library to increase resources for schools and access to books for young people and parents
- To provide mentors to students who need help to develop their literacy skills

#### Rational for Activities

Research shows that schools are suffering from reduced funding and no longer have sufficient funding to purchase books for their libraries, therefore mobile libraries help share expenditure and resources amongst schools. Our research has found that 80% of our young people with mentors have increased their expected GCSE grades by one whole grade over the course of a year.



### CHECKLIST



Consider your objectives for each aim. You might have a distinct set of objectives per aim or you might find there is an overlap.



Your objectives should demonstrate clearly what you intend to do to tackle the cause in question.



Your objectives might change as you innovate your services in response to changing demands, new technologies or customer feedback, so review and update them as necessary.



Do you have research or evidence to demonstrate why you have chosen to focus on these types of activities?

Exercise →

Define your objectives for your aims  
in Appendix A



## STEP 6 SCALE OF INTERVENTION

Outputs quantify the scale of the objectives that you plan to deliver. Each year you should look to set target outputs, and measure actual outputs on a real time basis.

You will probably have a number of outputs per objective. Your target outputs need to be SMART and are often influenced by a number of factors



### Case Study Example

*Objective - To provide mentors to students who need help to develop their literacy skills*

#### Outputs

Each year we plan to achieve the following outputs:

Output 1 - To engage 50 Schools in the Mentoring Programme

Output 2 - To engage and train 200 mentors

Output 3 - To provide 400 young people with a mentor.

Output 4 - To deliver 2000 hrs of mentoring support

### CHECKLIST



Are your outputs to be delivered within a specific time frame?



Do your outputs feel achievable and realistic to your team?



Do your outputs make financial sense for the organisation?



Do you have the necessary resources in place to deliver these outputs?



### Key Influences

- Financial – Do you need to sell or deliver a certain number of activities or engage a certain number of people to secure the finance you need to make the service or organisation sustainable?
- Strategic – Does your organisation want to achieve a certain level of outreach and impact this year as part of its growth strategy?
- Contractual – Does a funder or contract require your organisation to achieve specific targets?
- Impact – Do you need to deliver a certain number of activities with a certain no of beneficiaries to achieve the proposed outcomes?

### SMART Targets

Specific	Well defined = Clear to anyone that has a basic knowledge of the project
Measurable	Know if the goal is obtainable and how far away completion is. Know when it has been achieved
Agreed Upon	Agreement with all the stakeholders what the goals should be.
Realistic	Within the availability of resources, knowledge and time.
Time Based	Enough time to achieve the goal. Not too much time, which can affect project performance.

Exercise

Define your objectives for your aims in Appendix A



## STEP 7 MEASURING CHANGE



Outcomes describe the impact and/or change in a situation as a result of the activity or intervention. The outcomes demonstrate how the organisation is achieving its aim(s).

### DEFINE YOUR OUTCOMES

An outcome can be a total number or a measured change. i.e. a percentage or a ratio used to demonstrate the change. These may relate to the national or local benchmarks that have been identified relating to the cause. You can consider including a combination of soft and hard outcomes, over the short, medium and long-term over the short, medium and long-term to show the journey travelled by a client and the change that occurred over this time.

#### Soft outcomes

Relates to a development in attributes, skill, knowledge development. E.g. increase in confidence.

#### Hard outcomes

Relates to action oriented outcomes as a result of the soft outcomes. E.g. secured employment.

#### Short Term outcomes

This is when you measure impact indicators immediately at the end of the intervention.

#### Medium Term outcomes

This is when you measure impact indicators a short period after the intervention has ended to assess the following actions of the beneficiary.

#### Long Term outcomes

This is when you measure impact indicators after a longer period of time after the intervention was completed e.g. 1 year

It is beneficial to create SMART targets for your outcomes over a specified time period and to measure your achievement against these targets annually.



### Case Study Example

*Aim - 'To help improve literacy levels amongst 11 – 16 yr olds in London.'*

#### Each year we aim to achieve the following outcomes:

- Soft Outcome - For pupils to acknowledge an increase understanding of English grammar by 90%
- Hard Outcome – On average the schools we support will see a 10% increase in A-C GCSE English grades.
- Short Term Outcome - Teachers report an improvement in writing skills amongst 90% of the students supported by mentors.
- Medium Term Outcome – 1:2 mentored students will increase their scores within mock exams by 10%.
- Long Term Outcome - The percentage of 16 year olds who leave school with GCSE grade A-C in English will increase on average by 10%, amongst the specific schools we support.



## STEP 7 MEASURING CHANGE



### CHECKLIST

- Do your outcomes relate to your aims and demonstrate how you intend to achieve them with measurable figures?
- Will your outcomes represent a change as a result of your intervention?
- Are your outcomes SMART?
- Are your outcomes achievable based on your target outputs?
- Do you need short, medium and long term outcomes?

Exercise →

Define your outcomes for your aim in Appendix A



## STEP 8 CAPTURING YOUR IMPACT

To measure your impact you need to capture and record data relating to your activities and your clients at the beginning, at the end of the intervention, and possibly beyond through an evaluation process.

### CREATING THE BASELINE INFORMATION FOR OUTCOMES

Baseline information refers to the information you collect about your clients at the start, to enable you to measure a change in their circumstances to demonstrate impact. To plan your baseline data capture, refer back to your outcomes; and assess what data do you need to collect to demonstrate the current situation of the clients you are working with. You can collect this data as part of the application or purchasing process when a client engages in your service.

### Measuring Change

Once you have delivered your service or product, it is important to measure the change that has taken place as a result of the intervention. You will need measure this change over a period of time to assess your short, medium and long-term outcomes, using a variety of methods. Depending on what data you are evaluating you may measure the change real-time or annually. You might need to capture data from primary or secondary sources.

Secondary sources include data sourced from third parties, and any evidence must be referenced from the original source. Secondary data could be sourced from sources e.g.: - National Office of Statistics, or Statistics from Industry Reports - such as Mintel. Primary sources, is data that you collected directly with your potential or existing client base.

Choosing the most suitable method(s) for gathering primary feedback will depend on your target group and their preferred communication styles. You may need to adopt a range of approaches if you are seeking feedback from a range of stakeholders for example: - direct



beneficiaries (e.g. pupils), in direct beneficiaries (e.g. teachers, schools), funders (e.g. local authorities), and delivery team (e.g. mentors)

To capture data from clients directly the following methods can be used:

- Questionnaires – possibly presented as a competition, application form or evaluation survey. Distributed online, paper, mobile text.
  - Face to Face or Telephone Interview
  - Formal or Informal Facilitated Group Discussion or Focus Group
- A combination of open and closed questions should be used to capture both qualitative and quantitative data to evaluate impact, identify best practice, areas of weaknesses and ideas for improvement.
- Qualitative Data is descriptive evidence that gives explanations, for example, client testimonials or other customer feedback.
  - Quantitative Data is numerical evidence that presents statistical figures to the reader.



### Case Study Example

*Baseline information - e.g. the school's current English GCSE Grades and current grades of each student being supported.*

#### Evaluation process

- Short Term- Text Questions to Pupil and Questionnaire to Teachers
- Medium Term – Telephone Interview with School
- Long Term - Online Published Statistics e.g. school grades



STEP 9

## EVALUATING AND APPLYING YOUR IMPACT DATA



It is important to think about how to capture data from the outset.

### CAPTURING AND STORING DATA

A spreadsheet may well be a good starting point, but as the team and organisation grow it can get difficult to share, monitor and review all of this information. This approach may also be subject to data protection issues, if certain information is not held securely on clients. A better alternative is to set up a virtual client management system that can capture client communication, intervention and evaluation data and analyse it automatically in a secure online system. Some examples include Salesforce CRM, Sugar CRM, Substance, amongst others. Economic Change specialises in helping organisations to establish Salesforce CRM and processes to capture data. Salesforce CRM offers free user licenses to eligible non-profit organisations.

To find out more about Salesforce visit <http://www.salesforce.com/uk/foundation/>.

### Qualifying your impact

Depending on the industry sector or the preferences/ needs of your stakeholders you may instruct independent consultants to analyse and undertake an evaluation of your intervention. This will ensure your analysis is independent and un-bias to produce trusted results. Typically an independent consultant will analyse the data already collected and/or apply their own independent methods and choose a representative sample of beneficiaries and stakeholders to gather feedback.

### Communicating your impact

Evaluation data can be presented in a range of ways to communicate the results to stakeholders. Some suggestions are detailed below:

- Producing a visual road map to demonstrate the aims, objectives, outputs and outcomes of your organisation.
- Producing an Independent Evaluation Report that shows the strengths and weaknesses of your intervention for stakeholders.

- Creating a video stating key facts about the cause and the impact of intervention. Café Direct's TV Channel on U-Tube is a great example.
- Producing a supplementary Annual Impact Report that details all of the activity, achievements with case studies.
- Designing a dedicated website that demonstrates the activity and impact of your organisation.
- Producing a research report which evaluates the findings of your intervention and its impact on tackling the 'cause'.
- Publishing a press release that is circulated to media channels to showcase achievements or research findings.

### Applying your Impact Data

Once data has been captured and analysed, it can be applied in different ways to support the growth and sustainability of the organisation:

- 1) Quality Standard Marks
- 2) Continual Improvement Process
- 3) Cause Related Marketing

### 1) QUALITY STANDARD MARKS

Evaluation data can help to benchmark the organisation's achievements against national KPI's and secure quality standard marks.

There are some general Quality Standards that are applicable to all or most organisations that assess the quality of organisation's processes; such include Investors in People, Customer First, ISO9001, ISO 26000 and Carbon Smart Award for example. A Quality Standard also exists for social enterprises, called the Social Enterprise Mark, which certifies that the business is trading for a social purpose. Going through the process of achieving a quality standard is often very beneficial as it helps an organisation to



STEP 9

## EVALUATING AND APPLYING YOUR IMPACT DATA

establish and improve the processes of the organisation to a level considered to be best practice. It should be seen as part of an on-going improvement process and quality standards assessors will continue to assess the performance of the organisation to renew the standard every couple of years.

Clients will often choose a supplier who can demonstrate that they have achieved a series of quality standards as it provides confidence that their operations and practices are considered to be of a high level, audited by an external verifier.

### 2) CONTINUAL IMPROVEMENT PROCESSES

The findings of the evaluation data should be assessed in real-time to assess the performance of the current strategy and inform future planning against business functions such as:

- Current service provision
- Business processes
- Team performance
- Innovation
- Client relationship management
- Financial sustainability

### 3) CAUSE RELATED MARKETING

The key competitor advantage of an organisation that measures its social impact is its ability to communicate its level of impact on tackling a cause, when marketing its products and services. It is essential to communicate this clearly within communication tools and within the marketing and fundraising campaigns as it helps to distinguish it from other organisations. For example a Fairtrade Coffee brand will promote its fairtrade practices to consumers, to help it stand out from other coffee manufactures.

Your 'cause' related story will ultimately help to sell the brand to funders, donors, or

consumers, as it is evident that consumers are consciously purchasing from suppliers who can demonstrate ethical standards. E.g. The Social Value Act recently implemented by the Government.



### CHECKLIST

- ✓ Have you implemented a system and processes for capturing and analysing data in an efficient way?
- ✓ Have you produced communication tools to communicate your impact to internal and external stakeholders?
- ✓ Have you applied your impact results to help support the growth and sustainability of your organisation?
- ✓ Do you have the management team buy-in across relevant business departments?

### IN SUMMARY

Each activity and service delivered should contribute towards achieving the overall aims of the organisation. The change that occurs as a result of this intervention should be captured to measure and demonstrate the impact it has had on the customer to evaluate the value and performance of the organisation in tackling its defined 'cause'. Measuring social impact is a continual improvement process that should be implemented and monitored within everyday business practices to evaluate the performance of the organisation, real-time, to assess how it is performing against its target objectives, outputs and outcomes to achieve its defined aims.



## STEP 10 NEXT STEPS

### Next steps

If you are interested in follow-on coaching, training or consultancy to support the development of your Impact framework, process and/or system then contact Economic Change CIC.

We also carry out independent evaluations of programmes for funders and organisations.

### Please find links to other sources of useful information to explore below:

**Measurement Impact Tools** – In certain industries/causes there are ready prepared tools that you can explore to measure your impact, so it is worth investigating your options and best practice in your sector. An example is the Outcomes Star Framework.

*For further info visit [www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)*

**Social Return on Investment** – If you are keen to demonstrate how your intervention results in cost savings for other organisations e.g. NHS, then it is useful to explore SROI.

*For further info visit [www.thesroinetwork.org](http://www.thesroinetwork.org)*

**LM3 Model** – If you operate within a local community, you might be interested in exploring the local multiplier outcome framework.

*For further info visit [www.lm3online.org](http://www.lm3online.org)*



### About Economic change



Economic Change provides management solutions to help organisations improve their efficiency, sustainability and socio-economic impact.

We help our clients to develop their service offer, streamline business processes and evaluate their customer experience to ultimately maximise their impact.

Our combined expertise in business management, system design and social impact helps us to produce the best outcome for our clients.

We are passionate about supporting organisations that strive to make an impact by tackling an economic, social or environmental cause.

Our client list includes charities, educational bodies, public sector organisations, social enterprises, ethical businesses, and CSR departments of organisations.

### Contact us

**Telephone:** 0203 303 0893

**Website:** [www.economicchange.co.uk](http://www.economicchange.co.uk)

**Email:** [info@economicchange.co.uk](mailto:info@economicchange.co.uk)

# Appendix A example



Aim

'To help improve literacy levels amongst 11 – 16 yr olds in London.'



objectives

- To establish a Young Writers Club in schools to develop the talent of young writers
- To operate a Mobile Library to increase resources for schools and access to books for young people and parents
- To provide mentors to students who need help to develop their literacy skills



outcomes

- Soft Outcome - *For pupils to acknowledge an increase understanding of English grammar by 90%*
- Hard Outcome - *On average the schools we support will see a 10% increase in A-C GCSE English grades.*
- Short Term Outcome - *Teachers report an improvement in writing skills amongst 90% of the students supported by mentors.*
- Medium Term Outcome - *1.2 mentored students will increase their scores within mock exams by 10%.*
- Long Term Outcome - *The percentage of 16 year olds who leave school with GCSE grade A-C in English will increase on average by 10%, amongst the specific schools we support.*



outputs

Each year we plan to achieve the following outputs:-

- Output 1 *To engage 50 Schools in the Mentoring Programme*
- Output 2 *To engage and train 200 mentors*
- Output 3 *To provide 400 young people with a mentor.*
- Output 4 *To deliver 2000 hrs of mentoring support*



Remember SMART

Specific  
Measurable  
Achievable  
Realistic  
Timeframed

# Appendix A



## Aim



## objectives

To	<input type="text"/>
To	<input type="text"/>
To	<input type="text"/>



## outcomes

## Short term

Long term



## outputs

Each year we plan to achieve the following outputs:-

## Remember SMART

## Output 1

## Output 2

### Output 3

## Output 4

**S**pecific  
**M**easurable  
**A**chievable  
**R**ealistic  
**T**imeframed