



## Set Goals

### Overview of Content

Review the manager's version of the *Set Goals* module to familiarize yourself with the mindset shifts, skills and activities it contains. Most importantly, you need to support the following core capabilities that they are learning or improving:

- Recognize the value of clear, specific goals.
- Identify specific results to be accomplished.
- Articulate goals with specific, measurable targets and appropriate deadlines.
- Align personal, department and organizational goals.
- Communicate department goals that focus and engage their team and individual team members.
- Track progress, evaluate and adjust goals based on business objectives.

### Kick-off Meeting

Meet with your participant to agree on expectations for the module, including their learning objectives, how you will support them and how you will jointly measure successful completion.

#### Key Talking Points:

- Discuss the assessment results. Are there any major surprises? If so, what are they?
- Discuss how setting clear, measurable goals is the first step to achieving a vision.
- Identify the key skill(s) to focus on during the *Set Goals* module.
- Agree on specific business opportunities (results and culture) for the participant to better align, reset or accelerate their team's success by improving their ability to set and align clearer goals.
- What business objectives do they want to focus on as they apply their new skills that will make a difference in their team's results/impact/culture?

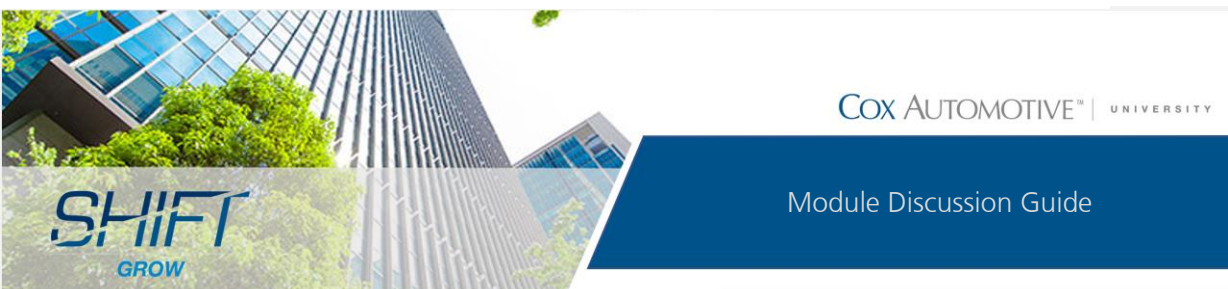
#### Questions to ask:

- "Which skill(s) in *Set Goals* would you most like to develop?"
- "Is there a particular area in your life, either work or personal, where you think this skill will be of value? Why?"
- "How do you think the skills learned in this module can help your team?"
- "What business and/or culture results do you most want to impact?"

**Commented [NA1]:** For the best outcome, participants' managers need to commit to make the time to review module content.

**Commented [NA2]:** something like this. we need to find ways to encourage the manager to explore mindset as well as activity.

**Commented [NA3]:** something like this. we need to encourage the manager to explore mindset as well as activity.



#### In -Module Activities

- You can expect the following actions to be completed by your participant(s) during this module: Schedule the following appointments:
  - Week 1 – Meet with goal-setting mentor, 15 – 20 minutes
  - Week 2 – Meet with manager or goal-setting mentor, 20 minutes
  - Week 3 – Meet with manager, 30 – 60 minutes
  - Week 4 – Meet with team members, 30 – 60 minutes. Schedule 1:1 with each team member, 15 minutes
- Journal to guided reflection questions throughout the module
- Week 2/Day 1 - Complete “What’s at Stake” worksheet
- Week 2/Day 2 - Complete “Right-sizing your goal” worksheet
- Week 2/Day 4 - Complete Q2 Conversation Starter worksheet
- Week 3/Day 2 - Complete “How do you stay aligned” questionnaire
- Week 3/Day 3 - Complete “What questions help us plan?” questionnaire
- Week 4/Day 1 - Complete the Set SMART Goals worksheet
- Week 4/Day 1 - Prepare meeting agendas

**Commented [NA4]:** Would it help to add the Week and Day numbers to these activities, so the managers know where they fit in the module?

### SMART Goals Worksheet

The *Set SMART Goals* worksheet is a key learning point for this module. We strongly encourage you to complete your own *SMART Goals* worksheet; this will help you prepare for your discussions and guide how you support them in their learning.

#### Your Action Items:

- If you’re not familiar with SMART goals, **review Week 1, Day 3** of the *Set Goals* module.
- Complete your own *Set SMART Goals* worksheet for a current job-related responsibility.
- Prepare to share your worksheet with your employee, demonstrating how you have selected a specific goal, with a measurable target and a due date.
- Review the participant’s *Set SMART Goals* worksheet during the same meeting.

#### Questions to Ask:

- “Tell me how you came up with your SMART goal.” Where was it easy and where did you struggle?
- “Describe how you decided on the measurable targets and due dates.”
- “What are you learning about your approach to setting goals and how it can help you make progress toward achieving it?”



- Do you have any questions about my goals and how yours align? How can I be clearer about my goals and the goals of our team?
- “How is your team responding to your adjustments in how you work with them to set goals?”
- “How can I help you?”

### Wrap-up Meeting

Hold a short meeting when the participant finishes the module to wrap-up the topic and ensure key points are conveyed.

#### Key Talking Points:

- This module supports you by developing your mindset and habits to focus, align and inspire your team. Setting Goals is an essential skill for a manager that directly impacts results and fosters environments to achieve them. It is critical that you align your goals to contribute to your manager’s goals.
- You will use what you have learned in this module to set goals for each of the following modules.
- As a manager, setting department goals is not just for you personally; your role is to ensure that your team is clear and aligned.

#### Questions to Ask:

- How does the SMART approach help you set and communicate clearer goals? Does anything about it get in the way of your success as a manager?
- “How will you keep yourself accountable to using SMART goals for you and your team?”
- “How can I help you make the most of what you have learned?”

Set SMART Goals — Use this simple format to get started with writing SMART Goals.



**Specific****Measurable****Achievable****Relevant****Time-based**

Do what (Relevant?)

Example 1: Increase non-warranty service appointments...

Example 2: Read and take notes on 3 Automotive News articles

From what

...from 25 a week...

(0)

To what (Challenging? Achievable?)

...to 27 a week...

(3)

By when

...in 3 months

...each week

Try your SMART Goal here

Enter or write your final SMART goal here