



# Goal & Plan Flexibility with ETW

*For maximum flexibility and adaptability within your Management Operating System, ETW offers several different goal types, and plan options.*

## INCORPORATING CHOSEN METHODOLOGIES

Your business likely already follows a chosen methodology in terms of goal-setting, and that could be anything from using the SMART goal formula, to crafting goals with the OKR framework, to a simple KPI model. Regardless of the model, ETW aims to make the user experience simple and streamlined with the different goal options and cascaded plans and supporting plans offered within the system.

## FOUR GOAL TYPES IN ETW

There are four main goal types in ETW to allow for maximum adaptability and flexibility. Goals may either tie directly back to a plan, be created individually, or created with a team or for a team. The possibilities provide enhanced flexibility, accountability and the options to cascade goals with their respective plans on an infinite level.

### A closer look...

**Plan Goals:** These goals are created on a Plan dashboard then assigned to a user. Plan Goals are specific to either a top level plan or supporting plan. In either case, it is directly tied to the success of a plan.

**Role Goals:** These goals are created in the Admin section, and assigned to a Role. Role Goals are inherited by users based on a Role that they have been assigned in the organization. It is important to note that Role Goals can be related to performance, culture or leadership.

**Manager-Assigned Goals:** These are goals created for a user, by their manager. For a Manager-Assigned Goal, the manager creates a goal for an employee on the employee's Goal page. Again, when created on the Goal page, these would typically be developmental goals unless the user/organization is not using the Plan feature of ETW.

**Personal Goals:** These are goals created by a user, for themselves on their Goal Page, not necessarily within a specific plan. Some personal goal examples could include those relating to personal development, project or training goals.



## Understanding User Goal Access

There are three types of Goal Access for ETW users: **Assignee, Participant & Viewer**

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**Assignees** are ultimately accountable for the results of the goal. They can access notes, add notes and can be evaluated on the goal.

**Participants** can also access the goal and add notes, but cannot be evaluated on it.

**Viewers** can view the goal but are not able to add notes, and cannot be evaluated on it.

## OUR GOALS IN YOUR SYSTEMS

Any of the aforementioned goal-setting methods would work for at least one goal type, and for some multiple. Take SMART Goals for example—in reality you could apply the SMART Goal formula to any or all of the four ETW goal types.

Plan Goals are best suited for goals and initiatives whose results we would like to ultimately link back to the main objectives of the organization. In this respect, an OKR goal-setting framework would fit nicely.

Role Goals, assigned to specific or common roles in the organization, would have common measures for success. They can be used for organization-wide initiatives, like “quality” or “safety”. Or, common role-based criteria, like sales quota.

Both Manager-Assigned Goals and Personal Goals are flexible enough to adapt to any methodology.

### TEAM GOALS

Another “unofficial” goal type that could be taken advantage of in complement to your methodology of choice is a Team Goal. Team Goals allow departments, teams, special project groups etc. to work toward a common goal while enforcing accountability and promoting transparency within the team.

## WHAT DOES ALL OF THIS MEAN FOR YOU?

The benefit of incorporating different goal types are based in the ability to motivate and connect every employees’ role to the most important objectives in the organization. While some goal types may have a more subtle connection than others—these are typically developmental and focus on aspects such as special projects, career development and culture—all should ultimately tie back to the success and well-being of the organization’s top-level plans.



## Understanding User Plan Access

There are three types of Plan Access for ETW users: **Owner**, **Participant** & **Viewer**

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**Owners** can create, edit and delete components in the Plan, and change plan settings—this includes Plan access for other users. Owners have the option to receive all notes added to goals within the plan on their Home page.

**Participants** can view and add notes to the Plan, and have the option to receive all notes added to goals in the plan on their Home page.

**Viewers** only have visibility to the elements of the Plan but cannot add notes, or change any part of the Plan.

## PLAN & SUPPORTING PLANS

The plan feature in ETW allows you to create and cascade top-level plans and supporting plans throughout your organization. Users have the ability to create an unlimited number of plans, and related supporting plans to properly cascade their objectives throughout the organization.

Top-Level Plans impact the entire organization, while Supporting Plans can be specific to departments, teams, locations, profit centers, operating companies, business units, etc.

## DIVING EVEN DEEPER

The potential for contextual data collection and KPI tracking is endless with the ETW platform. Because of the scalability and connection between and the relationship of Plans and Supporting Plans, users have the ability to make their KPIs more granular and ultimately more relevant to their objectives.

## CONTROLLED TRANSPARENCY

Transparency has its benefits such as increased accountability and engagement, for example. It is also important to understand, however, that having complete transparency one hundred percent of the time is not the ideal or even feasible solution for some organizations. Simply put, there may be some sensitive information that lower-level employees don't need or should not have access to. Relevancy and confidentiality are two of the biggest factors when it comes to evaluating whether or not specific information should be shared openly.

All of ETW's goal types and plans/supporting plans have access levels that can be applied when a user finds that the information at hand may not be suitable or possibly is just irrelevant with respect to certain employees. Every goal or plan can be created with complete, limited or zero transparency.

## FLEXIBILITY IN USER ACCESS FOR GOALS & PLANS

As a new ETW user, all of these different goals, plans and access levels are designed to organize your plans and goals while maintaining whatever level of transparency is most beneficial to your organization. The collection of labels and terminology help give users the flexibility they desire, while maintaining simplicity in the organization of goals and execution plans.

The flexibility of the ETW platform encourages transparency to company strategy and goals, appropriate visibility to goals and efforts, consistency of objectives and communications, and accountability to actions and efforts.

## About ETW

ETW provides a platform to track, evaluate and measure employee performance against the major objectives of the organization. Easily execute and translate long-term strategy into clear, actionable goals. With ETW you can effectively communicate the company's roadmap to success and engage everyone throughout the organization with that roadmap. Using ETW your organization can connect employees to strategy and culture to drive sustainable winning results.



### EXECUTE TO WIN

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