

SMARTERS Approach: Set & Achieve All Your Goals

Sarah Simpson



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1 Introduction

Welcome to this book on The SMARTERS approach to setting and achieving all your goals.

What I'd like you to do is ask yourself:

- do I ever, write goals that don't get realised?
- do I find that the goals I do set don't actually help me reach my aims or objectives?
- do I find setting goals for other people challenging?"

If the answer to any of these is "yes" and in the future you want to set challenging, appropriate and achievable goals then this book will give you all the information and skills you will need.

In it you will master the art of SMARTERS goal setting, using the formula of:

- Specific
- Measurable
- Achievable or Attainable
- Relevant
- Timely or Time-bound
- Evaluate, Ethical or Extending
- Re-evaluate or Rewarding
- Strategic

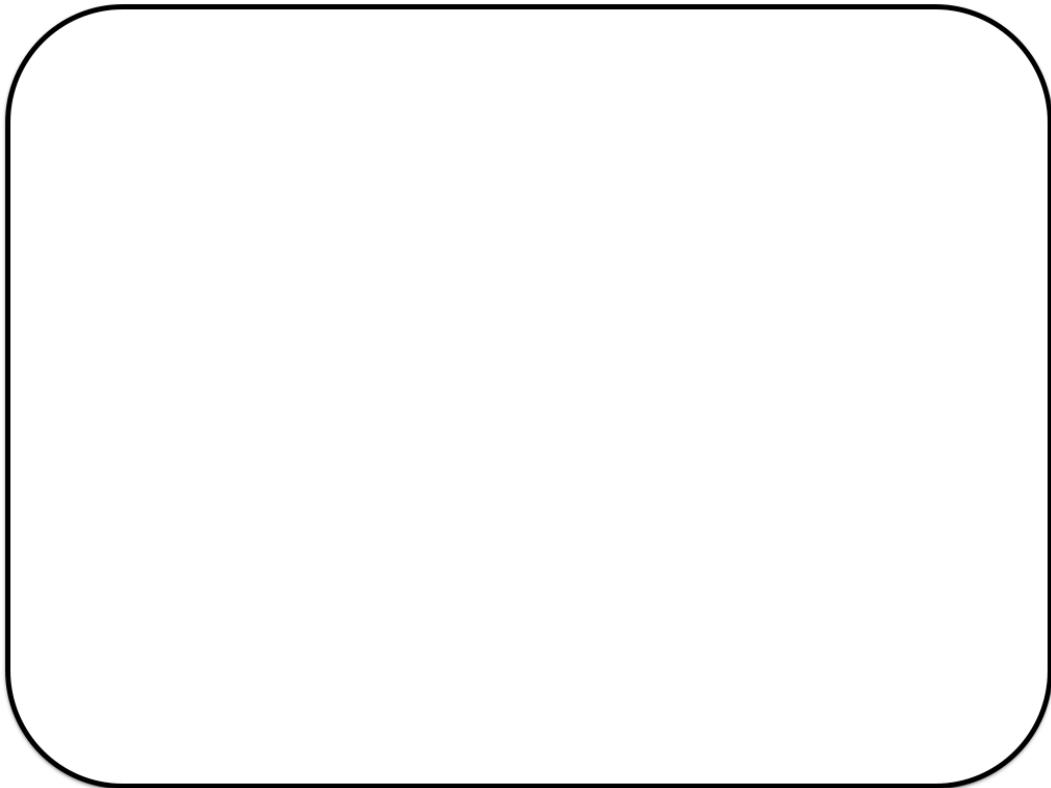
We will do this together by me guiding you through the 8 stages of goal setting and undertaking 8 associated activities.

My unique approach will have you setting and achieving goals that are appropriate, achievable and strategically balanced. And bear in mind I have taught this for many years and have been a manager undertaking both personal and colleague goal setting in both the public and private sector, and this approach has continually shown itself to be robust and accurate.

1.1 My goal

Ok, to get the best out of this book you should have a goal in mind and use this when you undertake the activities that are associated with each chapter. By doing this you can set this book in 'the real world' as it directly relates to your own unique situation and environment.

Question



The goal I will use to complete the 8 activities in this book is...

2 Why set goals?

Let's begin by looking at why you should set goals at all and a good place to start is to look at some of the situations in which you might set goals.

You could set goals for:

- personal means – work or home based
- an appraisal – yours or a colleague
- career development
- larger teams, departments or even organisations

That's the great thing about this book, the principles you will learn are the same no matter how big or small the goal, or goals you are setting are. In other words, once you have the basics you can 'upscale' or 'downscale' as needed.

Let's go back to the question we posed at the beginning of chapter 2 – "*why set goals*"?

There are 7 main reasons:

1. you take control – goals give you vision and direction and by achieving them you increase your opinion of yourself or indeed others in the case of wider goal setting
2. you make better decisions – goals focus your mind on what is a priority in both the short, medium and long term
3. your focus is improved – 'side' issues are given less of your attention and you can tunnel, focus down and get less distracted
4. assertiveness and self confidence is increased – reaching a challenging goal raises your assertiveness and gives you greater confidence in your abilities
5. task efficiency is improved – when you know where you want to be and how you will get there the tasks that are needed along the way become clear and unambiguous
6. you make continual and sustained progress – we know that people who reach goals, especially challenging ones will set in place a process of striving for ever higher and greater goals in the future. The phrase "*nothing breeds success, like success*" is clearly relevant here
7. setting goals is part of a journey which ends in success, achievement, self determination and increased self worth and development. So, there isn't anything not to like about it!

3 S is for Specific

This first element of SMARTERS stresses the need for a specific goal as opposed to a more general one.

Your specific goal should:

- be clear and unambiguous
- not contain platitudes
- not be meaningless, unimaginative or mundane
- It must explain:
- exactly what is expected
- why its important
- who's involved
- where its going to happen
- which attributes are important

A specific goal will answer the 5 W's:

- What do I want to accomplish?
- Why do I want to accomplish it? – specific reason, purpose or benefit
- Who is involved – does your goal rely on others helping or supporting?
- Where will it take place? e.g. place or environment
- What do I require – do you have any requirements or constraints. for example time, money, support or other resources?

Example of **ambiguous** vs **specific** goals would be...

Work based

version 1

"I am going to work harder this year"

version 2

"I am going to undertake 1 internal training and development course every month for a year"

Home based

version 1

"I am going to spend more time with the kids"

version 2

"I am going to take the kids to the park every weekend"

With both of the *specific goals* you can quite easily see whether they were achieved or not.

3.1 Activity the 5 W's

Activity 1 SPECIFIC – The 5 W's

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your SPECIFIC goal(s)

element	description	your response
What do I want to accomplish?	describe your goal(s)	
Why do I want to accomplish it?	what is your; specific reason, purpose or benefit	
Who is involved?	does your goal rely on others helping or supporting? (if 'yes' please expand)	
Where will it take place?	place or environment	
What do I require?	do you have any requirements or constraints e.g. time, money, support or other resources	

4 M is for Measurable

This second element emphasises the need for a robust criteria that you can use to measure your progress towards attaining or reaching your goal.

The idea behind this is that if you cannot measure a goal then it is impossible to know, with any degree of certainty, that you are making progress or have reached the end point.

Measuring your progress will help you:

- stay on track
- maintain your focus
- reach 'along the way' targets (and we'll look at this in greater detail in T is for Timely)
- keep momentum and dedication going by showing progress to date

This is why for example when I undertake annual staff appraisals I would measure progress every month for the first 3 months, then at months 6 and 9 and then monthly again for the last three months (months 9–12). So, this equates to 8 reviews over a year long period. But, even this is not 'set in stone' and would be adapted as necessary.

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A goal that is measurable will answer the 4 H questions such as:

- How will I assess my progress?
- How much?*
- How many?*
- How will I know when I have accomplished my goal?

*both of these could be quantitative or qualitative, but clearly quantitative is often easier to measure

Examples of **measurable goals** would be:

- To increase sales by 10%
- To reduce waste by 15%
- To increase productivity by 5%
- To increase staff satisfaction level from satisfied to very satisfied

4.1 Activity – The 4 H's

Activity 2
Measurable – The 4 H's

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your MEASURABLE goal(s). Remember, this measures your goal, both in terms of completion and stages along the way

element	description	your response
How will I assess my progress?	at what time scales will you review progress? will you have set 'way point' goals at each review?	
*How much?	Is your goal quantitative or qualitative?	
*How many?	Is your goal quantifiable in numerical terms?	
How will I know when I have accomplished my goal?	What factor(s) will you measure or quantify in order to know if you have reached your goal	

* these two values will be very much specific to your particular goals. But, whatever goal you have there will be a way of measuring its success and completion and you should be clear as to what that measure is.

5 A is for Achievable or Attainable

This third element of the SMARTERS approach examines the importance of having goals that are achievable and attainable.

Goals should stretch you as you move through the stages to achieving it, but it should not be so extreme that the chances of success are small. In other words it shouldn't be out of reach or below your normal standards of performance as to be easy and 'every day' – both of these would be meaningless. Neither should goal setting be a mundane 'tick box' exercise.

I like to call the area where goals are the most beneficial to development '**the Goldilocks zone**'. This area is perfect for allowing people and teams to reach goals they may not have thought possible, but when achieved will create a mindset that pushes them ever further forward in a continual path of development and success.

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goals should be stretching
not easy or out of reach

'easy' &
not challenging 'goldilocks' goal
zone out of reach

When you undertake the process of setting goals that are important to you or your organisation, you start to develop ideas as to how these can become a reality. You also refine the; attitudes, skills, abilities and capacity to reach them.

The theory behind this element states that a successful goal may cause you to identify opportunities that you may have previously overlooked and that are now brought into focus. Therefore, the very process of setting and achieving goals opens you up to other opportunities that you may not have previously considered.

You can assess how achievable and attainable your goals is by using the 4I's:

- Is my goal too 'safe'?
- Is my goal 'stretching' enough?
- Is it achievable in the timeframe I have set?
- I believe it to be achievable because...

5.1 Activity – The 4 I's

Activity 3

Achievable / Attainable – The 4 I's

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your ACHIEVABLE / ATTAINABLE goal(s).

For questions 1–3 you will need to expand / explain why you have answered “yes” or “no”

element	description	your response
Is my goal too ‘safe’?	could your goal be classed as ‘easy’ or a ‘tick box’ exercise?	
Is my goal ‘stretching’ enough?	what is it about my goal that is challenging and ‘stretches’ me?	
Is it achievable in the timeframe I have set?	do you have previous experience in this type of goal, or are you working on a ‘best guess’? what way point time scales have you set and what will you do if things get ‘off track’?	
I believe it to be achievable because...	do you have the right; support, attitude, finance, resources, commitment etc.	

6 R is for Relevant

connected with what is
happening

correct or suitable for a
particular purpose

We can describe a 'relevant' goal as...

When relevant individual or team goals are met; you, the team, the department or the organisation are continually driven forward.

A goal that is either in alignment or is supportive of other goals can be considered relevant if it can answer these 5 questions:

1. Does this seem worthwhile?
2. Is this the right time?
3. Does this match with personal or a wider need?
4. Are you the right person?
5. Do my goals success depend solely on me or do I need others? If the answer is others how will I get their support?

This elements of SMARTERS has linkages with the last element we will look at – Strategic. If you can show how personal goals help reach and contribute to the wider strategic goals you are more likely to get the support, resources and commitment from others that you require.

6.1 Activity – DIDAD

Activity 4 Relevant – The DIDAD

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your RELEVANT goal(s)

element	description	your response
Does this seem worthwhile	can I qualify the ‘worth’ to me and the wider team, dept, or organisation can I ‘justify’ this goal?	
Is this the right time?	is this goal appropriate in the current environment or situation?	
Does this match with my or the wider need?	how does this goal fit in the both mine and the wider short, medium and long term strategy?	
Are you the right person?	is this goal best suited to you? Is it appropriate, stretching and relevant enough for you ?	
Does my goals success depend solely on me	do I need others or additional resources to help me achieve my goal? If the answer is “yes” then how will you secure this?	~~~~~

7 T for Timely or Time-bound

This fifth element of SMARTERS examines the importance of setting goals within a time frame with regular reviews and a target date. A commitment to a solid deadline gives you something to focus your efforts on, in order to complete on time or maybe even before.

Being timely helps to ensure that goals don't get overtaken by day-to-day activities or crisis that will inevitably arise. It establishes a sense of urgency, monitors progress, and keeps you on track.

A time-bound goal answers these 5 questions:

1. When can I start? do you have all the SMARTERS elements of your goal established and any resources or commitments in place?
2. What can I do today? is there anything you can start straight away?
3. What can I achieve / do 6 weeks from now? What would you like to have, or expected to have achieved in 6 weeks? Remember you should be able to measure your progress (M for Measurable).



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4. What can I achieve / do 6 months from now? What would you like to have, or expected to have achieved in 6 months. What will you do if you are behind schedule and what is your contingency?
5. When should I review progress? For each goal you should establish a time frame for reviewing progress. Each element of SMARTERS should be reviewed each time to check for progress and changes in strategy or the environment.

Remember if there is no time frame then the goal cannot be SMARTERS

7.1 Activity – The 5 W's

Activity 5 Timely / Time-bound – The 5 W's

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your TIMELY / TIME-BOUND goal(s)

element	description	your response
When can I start?	do you have all the SMARTERS elements of your goal established and any resources or commitments in place?	
What can I do today?	is there anything you can start straight away?	
What can I achieve / do 6 weeks from now?	what would I like to have, or expected to have achieved in 6 weeks? remember you should be able to measure your progress (M for Measurable)	
What can I achieve / do 6 months from now?	what would I like to have, or expected to have achieved in 6 months What will I do if I am behind schedule / what's my contingency?	
When should I review progress?	for each goal you should establish a time frame for reviewing progress each element of SMARTERS should be reviewed each time to check for progress and changes in strategy or the environment	

8 E is for Evaluate, Ethical or Extending

The next three elements are ones which you may not be as familiar with as the first 5 that form SMART.

Lets take 'E' first. This can stand for Evaluate, Ethical or Extending and we'll take each of these in term.

8.1 Evaluate

Ask yourself, how will you evaluate the path you are taking and its relevance in helping you reach your wider goals or personal development?

8.2 Ethical

conforming to standards of conduct

pertaining to right and wrong

avoiding activities that do harm to
people or the environment

Ethical can be defined as...

So, ask yourself:

- do your goals have any linkages with corporate social responsibility (CSR)
- could they break normal standards of behaviour
- could they adversely affect someone else, the wider community or the environment. A good thing to remember and refer to is your stakeholder map which I will put below.



8.3 Extending

Finally E can also stand for Extending. Your goals should be challenging enough to examine established practices and ways of working or make a contribution to your individual or wider overall direction, plan or strategy.

This is one of the ways that setting appropriate, well considered goals continually propels or moves individuals, groups and organisations forward. Remember ‘The Goldilocks zone’ that we looked at in chapter 5.

8.4 Activity

Activity 6

Evaluate, Ethical or Extending – The **HowDY** Approach

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify your EVALUATE, ETHICAL or EXTENDING goal(s)

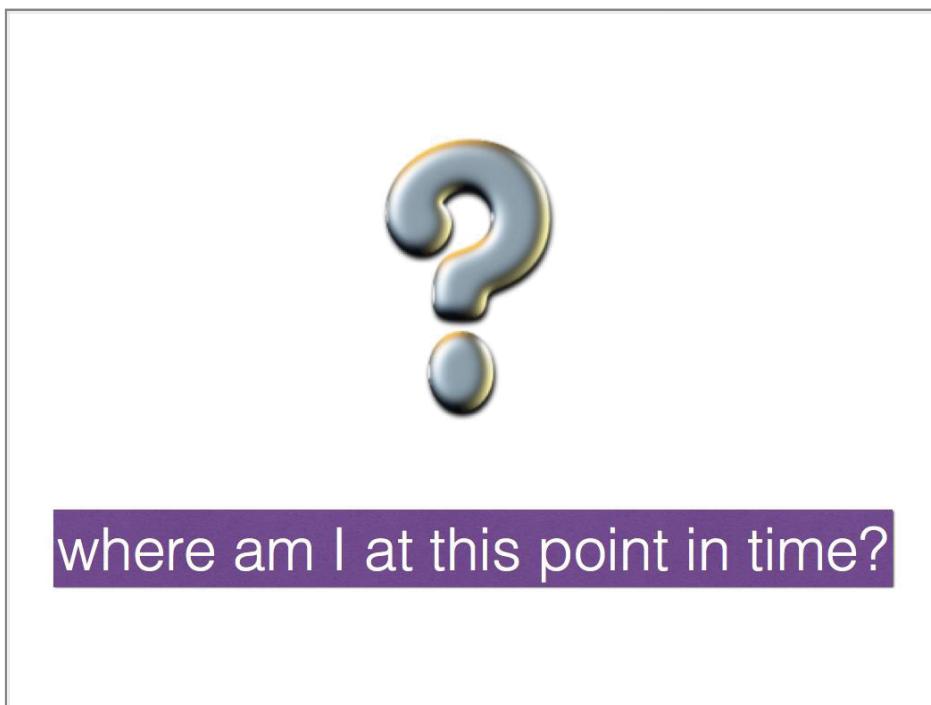
element	description	your response
H ow will you evaluate?	how will you evaluate the path you are taking and its relevance in helping you reach your goals are your day-to-day actions goal friendly?	
D o your goals pass the 'ethical test'?	do your goals have any linkages with corporate social responsibility (CSR), could they break normal standards of behaviour, or could they adversely affect someone else, the wider community or the environment.	
Y our goals are challenging?	are your goals challenging enough to examine established practices and ways of working or make a contribution to your individual or wider overall direction, plan or strategy.	

9 R is for Re-evaluate or Rewarding

If your goal is a longer term one you need to ask yourself what processes do I need to put in place to continually evaluate its progress, relevance and reward?

9.1 Re-evaluate

We have spoken before about the need to continually review your progress, but re-evaluation goes a stage further in so much as it asks 2 fundamental questions...



- 1.
- 2.



is this goal still relevant?

During the lifetime of your goal internal and external environments may change or a strategic direction may have altered. If a goal is no longer relevant you must be confident enough to know when to redirect or set new goals.

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9.1.1 PESTLE

These internal and external influences often come in the form of PESTLE which you may be familiar with.

As a recap PESTLE stands for

- Political
- Economic
- Social
- Technological
- Legal
- Environmental



PESTLE – expansion

Element	Description
Political	Current & future legislation Government policy Conflict Environmental concerns / policy Trade barriers and policy Global trade legislation
Economic	State of home economy State of international economy Exchange and interest rates Tax
social	Demographics Fashion and trends Advertising and publicity Ethical concerns Religious impact Media Brand image Buying patterns & trends Social media impact
Technological	How consumers buy Innovation Communication channels Technological 'age' Dependent technologies R & D
Legal	Consumer law & protection Employment law Health & safety International law Industry specific Competitive regulation
Environmental	Local, national and international environmental concerns & law Customer values Stakeholder attitude and consideration Staff engagement and moral Ecology

9.2 Rewarding

"worth doing because it makes you happy, or you think its useful or important"



We can define rewarding goals as...

Ask yourself, can your goal be classed as rewarding for you, your colleagues or your organisation?

9.2.1 Elements of reward

Clearly whether or not something is rewarding is likely to be very subjective, but some of the elements or definitions involved in reward include:

- **informative** – does my goal give me new information?
- **experiential** – do I or others expand our experiences as a result of both the journey and reaching this goal?
- **beneficial** – is the goal beneficial to me and others? (they could be internal or external)
- **advantageous** – does the goal offer me, me colleagues or organisation advantages. Do your goals impact on; competitiveness, customers, stakeholders, efficiency, effectiveness etc.
- **productive** – does the goal increase personal or wider productivity? This could be qualitative or quantitative

- **valuable** – does the goal add ‘value’? For example this could be in terms of productivity, customer service and USP (unique selling point)
- **satisfaction** – do you get greater job or role satisfaction in both the journey and reaching your goal?
- **worthwhile** – what is my goals ‘worth’ both personally and wider. Does it increase qualitative elements such as motivation and happiness, or does it increase quantitative elements such as sales and productivity?

If some of these 8 elements are present or can be attached to your goals then it is likely they could be defined by you and others as rewarding.

9.3 Activity – 2 R's

Activity 7 Re-evaluate or Rewarding

Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify how to RE-EVALUATE or test your goal(s) for how REWARDING they are

element	description	your response
re-evaluate	<p>when will you review your goal?</p> <p>how will you assess where you are?</p> <p>how will you decide if your goal is still relevant?</p> <p>(remember the PESTLE test – these are all elements that could impact on a goals relevance)</p>	
rewarding	<p>which of the following could be attributed to your goal – these could be for you, your colleagues or your organisation:</p> <ul style="list-style-type: none"> • informative • informative • beneficial • advantageous • productive • valuable • satisfaction • worthwhile 	

10 S is for Strategic

The final element of the SMARTERS approach is Strategic.

A well constructed SMARTERS goal can increase the likelihood of it being supported by your wider organisation. In my experience this is the element which is the most persuasive. So, what you need to do is make linkages between your goals and your personal and organisational strategic direction.

As yourself, how do your goals fit in with your personal short, medium and long term strategic plans as well as that of your wider organisation, if appropriate in your case.

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where are your linkages? (short, medium and long term)

your goals



personal strategic direction



organisational strategic direction

So, lets expand this strategic element further.

In the simplest terms you need to answer 4 questions – and these are the same questions you would ask in any strategic planning process:

1. where am I now?
2. where do I want to be?
3. how will I get there?
4. how will I know when I get there?

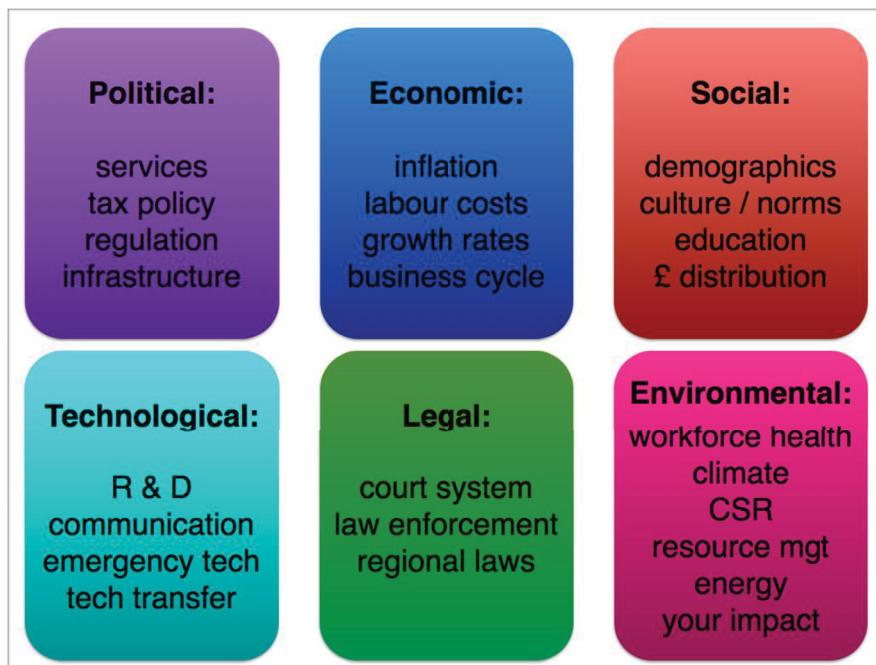
We'll take each of these 4 in turn and I'll show you some simple tools and methods you can use.

10.1 Where are you now?

Tools you can use are SWOT analysis (strengths, weaknesses, opportunities and threats). Opportunities and threats are often external rather than internal.



You can go a stage further and link this to the PESTLE analysis we looked at earlier in chapter 9. If you remember PESTLE stands for political, economic, social and technological, legal and environmental. To save you time looking back through the book I'll put another copy of this image below.



10.2 Where do you want to be?

I have found one of the best ways to examine this is by using these 10 questions:

1. What are your values?
2. What do you believe in?
3. What are the values and expectations of other stakeholders?
4. What would excite you?
5. What would excite your customers?
6. Where do you want the to go in the long-term?
7. What do you want the organisation to look like in the long-term?
8. Why would your customers choose to do business with you?
9. What will your customer experience be like?
10. What will it be like for you, and staff who work for you?

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10.3 How will you get there?

And this is basically an options appraisal exercise in which you decide which is the best route for you to take to reach your goals.

The three methods I like, although of course you will need to pick the one which is best for you and your situation are:

1. criteria testing
2. De Bonos Hats
3. Johnson & Scholes

10.3.1 Criteria testing

Let's look at criteria testing first and this does actually what the title suggests. You are evaluating and comparing different options by rating them against a set of criteria that's important to you.

Your goal path options would go down the left hand side and your criteria along the top. You can then assign each option a score out of 10 for each criteria.

	criteria 1 cost (score 1-10)	criteria 2 time (score 1-10)	criteria 3 impact (score 1-10)
option 1			
option 2			
option 3			
average score			

10.3.2 De Bonos's 6 hats

This method is particularly beneficial when you are dealing with a highly complex goal that requires multiple resource streams. The theory is that you 'wear' each hat in order to thoroughly assess a goal without bias.

Blue – what is the subject? what are we thinking about? what is the goal?

White – considering purely what information is available, what are the facts?

Red – intuitive or instinctive gut reactions or statements of emotional feeling (but not any justification)

Green – what possibilities, solutions or ideas are there?

Optimistic response **Yellow** – logic applied to identifying benefits, seeking harmony

Discernment **Black** – logic applied to identifying reasons to be cautious and conservative



10.3.3 Johnson and Scholes

The final method I like when goals are less complicated than you would use in the 6 hats method above is the Johnson and Scholes approach of asking “*what is a goal*”:

- **feasibility** – have you got the resources you need?
- **suitability** – does it match your skills, personal and wider strategy?
- **acceptability** – are those around you going to be affected? you should look at this from a whole stakeholder perspective (see stakeholder map in 8.2)

As a minimum you should be able to demonstrate that your goal is congruent with your personal and wider organisational goals.

10.4 How will you know when you get there?

This is the final question you need to ask and it is answered by having **Specific** and **Time-bound** goals and we looked at these when we examined the first of the SMARTERS objectives, S for Specific (chapter 3) and also when we looked at T for Timely or Time-bound (chapter 7) and you of course did the two associated activities for these earlier.

10.5 Activity – The 4 Q's of Strategy

Activity 8
Strategic

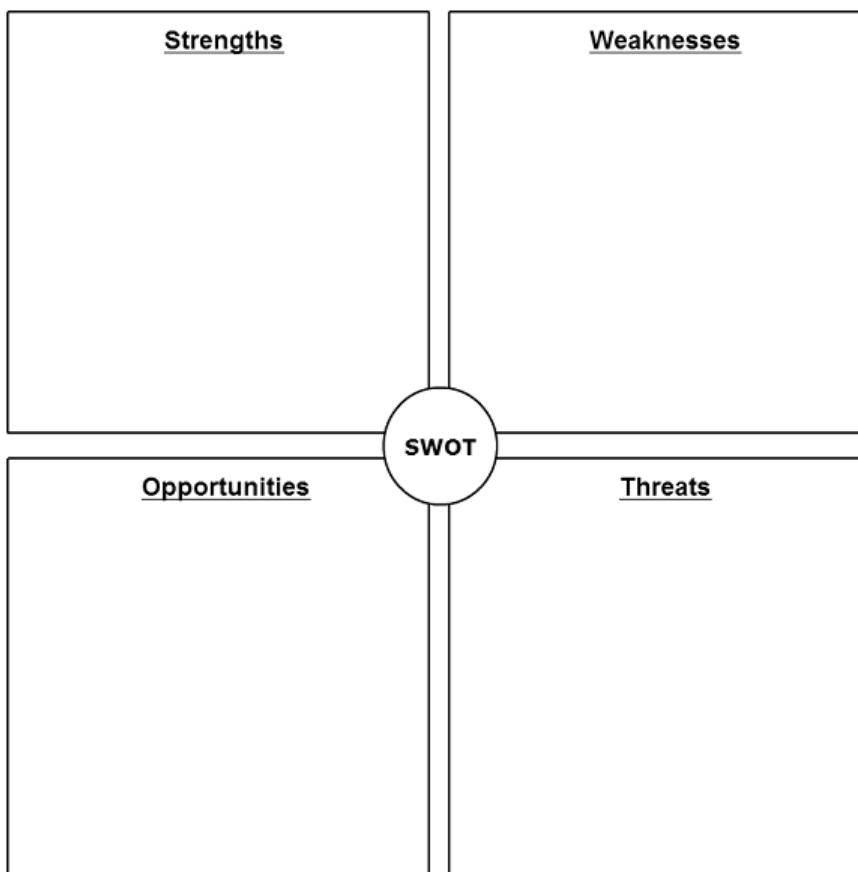
Using your own goal(s) that I asked you to identify at the beginning of this book please use the template below to identify how STRATEGIC your goal(s) are using the 4 questions:

- where am I / we now?
- where do I / we want to be?
- how will I / we get there?
- how will I / we know when we have got there?

10.5.1 Q 1 – Where am I / we now?

SWOT

Below is a filled in SWOT analysis followed by a template for you to complete.



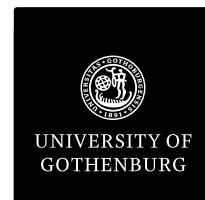
10.5.2 Q 2 – Where do I / we want to be?

question	response
What are your values?	
What do you believe in?	
What are the values and expectations of other stakeholders?	
What would excite you?	
What would excite your customers?	
Where do you want to go in the long-term?	
What do you want the organisation to look like in the long-term?	
Why would your customers choose to do business with you?	
What will your customer experience be like?	
What will it be like for you, and staff who work with you?	

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10.5.3 Q 3 – How will I / we get there?

i. Criteria testing

	criteria 1 cost (score 1-10)	criteria 2 time (score 1-10)	criteria 3 impact (score 1-10)
option 1			
option 2			
option 3			
average score			

ii. De Bonos 6 Hats

element	description	your response
white hat (facts)	considering what information is available, what are the facts?	
red hat (feelings)	intuitive or instinctive gut reactions or statements of emotional feeling (but not any justification)	
yellow hat (benefits)	what values and bedfast are involved in the goal why might it work?	
black hat (cautions)	logic applied to identifying reasons to be cautious and conservative	
green hat (creativity)	statements of investigation, seeing where a thought goes	
blue hat (process)	what is the goal?	

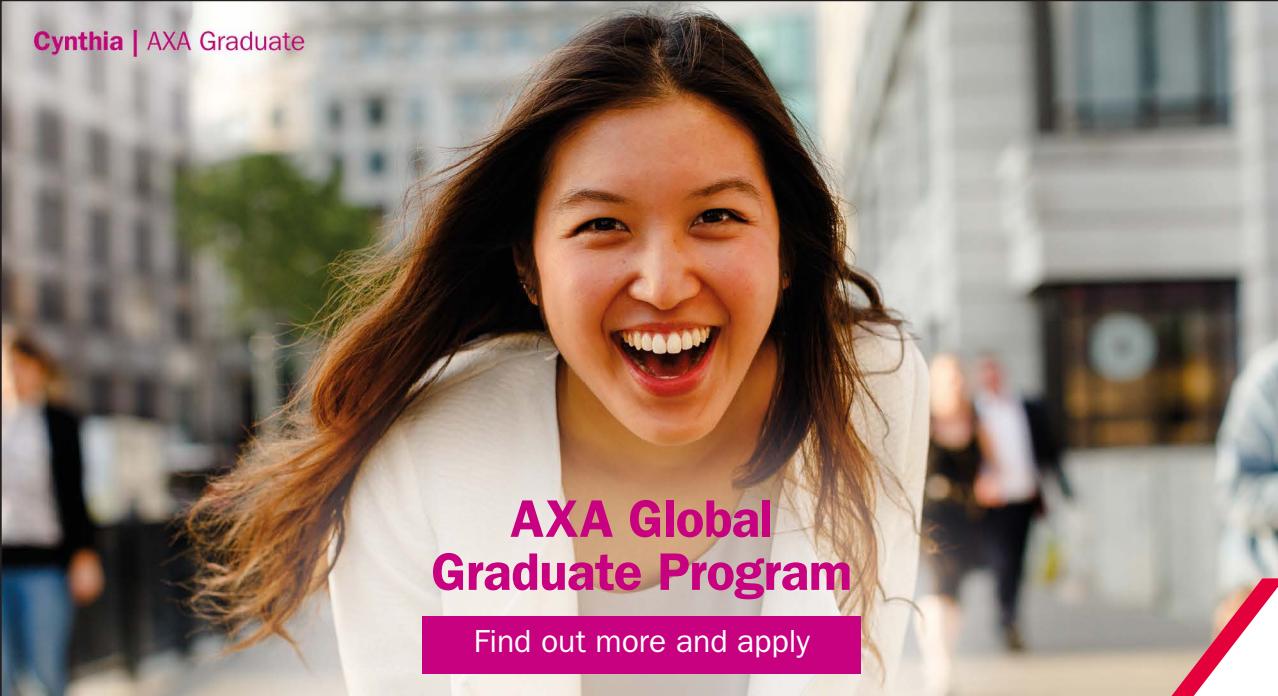
iii. Johnson & Scholes; Feasibility, Suitability & Acceptability

element	description	your response
feasibility	have you got the resources you need?	
suitability	does the goal match your skills? does the goal match your personal & wider strategy?	
acceptability	are those around you going to be affected? (you should look at this from a whole stakeholder perspective – internal & external)	

10.5.4 Q4 – how will you know when you get there?

This question is answered by having specific goals and we looked at these when we examined the first of the SMARTERS objectives (**S for Specific**) and also when we looked at **T for timely or time bound**.

So, look back on your activities for chapters 3 & 7 for your response to this final strategic question.



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11 SMARTERS summary

This book has covered the 8 elements of settings SMARTERS goals and objectives, which were:

- Specific
- Measurable
- Achievable or Attainable
- Relevant
- Timely or Time-bound
- Evaluate, Ethical or Extending
- Re-evaluate or Rewarding
- Strategic

By working logically through the 8 stages of goals setting you will now be able to set and achieve all your future goals.

The unique approach we have covered will have you setting and achieving goals that are appropriate, achievable and strategically balanced.

And don't forget I have taught this for many years and have been a manager undertaking both personal and colleague goal setting for many years and this approach has shown itself to be continually robust and accurate.

Take care

Sarah

If you would like to undertake my SMARTERS course online (fully downloadable) please see the link below

<https://www.udemy.com/the-smarters-approach-to-setting-achieving-all-your-goals/?couponCode=bookboon>