Goal Setting

At the top of our iteration cycle, we take the time to set goals for our teams and develop an action plan that gets us there. To do this, we look at upcoming milestones, break them down into manageable pieces, consider the time and scope involved, and clearly communicate our expectations on actions and outcomes. Goal setting lends important context and meaning to smaller tasks; the team understand how these pieces will fit together.

Here's how the meeting comes together:

1. Brainstorm: What's next for your team?

Take a few minutes to brainstorm goals for this next cycle. Don't react or discuss, just make a list. Multiple perspectives is key here. Set a timer for 3 minutes, and have each team member write goals on a post-its. There's no right number here—just go with however many or few you think of.

2. Selection

Once you've got a healthy list of goals, take a few minutes to share and sort through them as a group. Focus on near term priorities. Are any of these items necessary for the execution of others? Rearrange the post-its to reflect an order that makes sense to you.

3. Make them SMARTer

Go through each goal check it against the acronym below. Edit the goal as you go, making the language as clear and explicit as possible. This might take awhile your first few times through, but soon your team will be speeding through these.

Is your goal…

Specific

- The aim here is to find a happy medium—not so specific that you're boxed in, but specific enough that you know where to begin and how to approach the problem.

Measurable

- How can your goal be quantified? Does it have a specific deliverable?

Agreed Upon

- Do you understand the purpose of this goal? Is everyone on your team on board? Is this the right time for your group to spend resources on this? This could still be a valid goal for the project, but maybe it's not a priority right now. Or, maybe it's a slower cycle for a couple of people and they can work ahead on goals they see on the horizon.
- If you've identified a great goal that won't fit in this iteration, put it in a separate stack to log for later on Trello.

Reasonable

- This is a reality check—first, make sure you're not setting your goal posts too far out there. (Your goal should challenge you, not cause you to have a nervous breakdown.) Also consider who might be working on this goal. Who has the biggest appetite for this work? Is this a big stretch? If so, what support does that person need?

Timebound

- What's the deadline? How long will you spend on this?

Example:

Here's a sample goal. It articulates an upcoming need for the project. Let's run it through the acronym.

GOAL: "We need language for our podcast quiz."

- **Specific:** What language, exactly? The team discusses and realizes this is too vague—some of them thought this was for onboarding, and others thought it was the editorial copy.
    - Edit: Write the fillintheblank sentences for our podcast quiz. The group also notes they need onboarding language, just not right now, so they create a separate card to tackle in a later iteration.

- **Measurable:** Is the goal to write one sentence and be done? No—they want several to choose from.
  - Edit: Brainstorm 10-12 sentences for the forms on our podcast.
- **Agreed Upon:** Group check in. Is everyone on board? Do we need this now? Yes. No edit
- **Reasonable:** Does this goal seem doable? The team has anticipated this need, and has done research to collect the many ways people talk about podcasts. One team member agrees to take this on, and feels comfortable doing so, but wants a second eye before the team commits. In discussing this, they realize that the goal isn't to write the sentences—it's to have the sentences to include in their app. They don't need 12—they need 3. They edit to make it a slightly higher-level goal:
  - Edit: Choose 3 sentences for the *fill-in-the-blanks*.
- **Timebound:** They set an early deadline to make sure other team-members have it to incorporate into their user testing later this week.
  - Deadline: Thursday.

END GOAL: Choose 3 sentences for the fill-in-the-blanks. (Much better!)

4. Break it down

What has to come together to achieve this goal? Take the time to make a quick list of tasks associated with this goal. Action items could include:

- Brainstorm 10-12 sentences.
- Provide feedback in Google doc
- Choose 3 sentences to test with users

5. Budget it

How long will each task take? Assign each task a budget in hours, like this:

- Brainstorm 10-12 sentences. (1)
- Provide feedback in Google doc (.5)
- Choose 3 sentences to test with users (.5)

6. Rinse and repeat

Test each goal against the SMART acronym for each of the goals your group wants to tackle during this cycle. Don't forget to save a stack of future goals.

7. Step back and review the bigger picture.

Look at the cycle ahead. Is your team's plate too full? If so, what can you shelve until next cycle? Is one person taking on too much? If so, who can help? If your plate isn't full enough, think about how you might be more ambitious this cycle. Looking forward, what might you get ahead of? Your budget should be ballpark 15 hours—that's 23 hours of open lab time and 56 hours of outside work per week.

8. Seek outside perspective.

In the second part of goal setting, you meet quickly with your Feedback Group—one other team that you'll consistently meet with during the quarter. Consider the other team's plan, checking it against the SMART acronym and double checking assignments for budget and scope.

Tracking with Trello
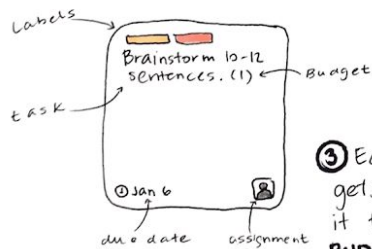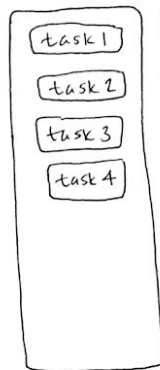
AT THE END OF YOUR GOAL MTG...

WORK & TRACK

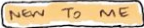① Clean up your 📄 Google Doc to capture your goals as initially envisioned.

② **MOVE** your task list into Trello.

GOOGLE DOC
- Task 1
- Task 2
- Task 3
- Task 4

TO DO

task 1

task 2

task 3

task 4

TRELLO

Labels

task

Brainstorm 10-12 sentences. (1) ← Budget

⏱ Jan 6

due date   assignment

③ Each **CARD** gets a **LABEL** tying it to a goal, a **BUDGET** of how long it should take, a **DUE DATE**, and an **ASSIGNMENT**.

④ Additional **labels** include NEW TO ME if a team member is tackling something unfamiliar, and BLOCKED if you get stuck during the cycle.
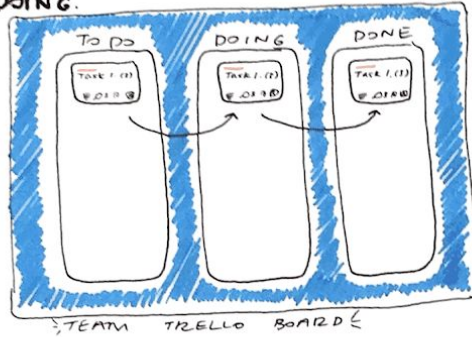
⑤ Big **MILESTONES** get a ≥STICKER≤ to demonstrate how special they are.

launch website

⭐

DURING THE CYCLE...

When you **START** a task, move the card to **DOING**.

When you **FINISH** a task, move the card to **DONE**.

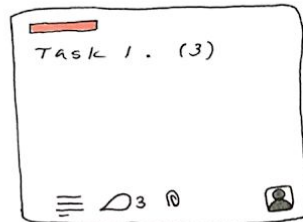.TEAM TRELLO BOARD.

AS YOU GO...

card etiquette

Leave comments to track your time and progress

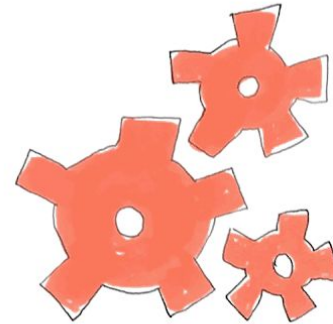Spent 30 min on this tutorial before I realized it won't work. :(

Found this awesome library and spent 2 hours going through all the documentation and experimenting with examples. It's perfect, and I'm ready to roll!

@joegermuska I set up some demos here:

TASK 1. (3)

☰ 🗨3 📎 👤

Attach screenshots and files

ping others if you need help, or to cheer them on!

WORK & TRACK

Retrospective

Reviewing and reflecting on the work your team completed

At the end of our iteration cycle, we take the time to look back: to consider what we set out to do, to look at what we actually did, and to consider the delta. This helps us not only to better understand our work, but also to better understand our process and planning. Did we budget correctly? Did we get lost? Did we learn new information that changed our course midstream? These are all important questions to consider before setting a new agenda for the coming cycle. It's also a moment to present work and receive feedback.

Here's how the meeting comes together:

1. Get Your (Trello) House In Order

Take a look at your Trello board does it reflect the work you actually did this cycle?

- Check to see if there are any cards that need to be moved from "Doing" to "Completed". How many were there? If the number is greater than two, it's a good indication that you need to check in with your board more often during the cycle.
- Is there anything you worked on this cycle that isn't represented on your board at all? Take a moment to make a card for anything unexpected that came up.
- There's a good chance you still have some cards in your "Doing" column that weren't completed this cycle. Try to diagnose why: Can any of these tasks be broken down into smaller cards? Sometimes when you begin to work on a task and learn more about it, you realize it's actually two or three subtasks. Tracking cards for these subtasks makes it easier to see where you spent your time and gives you a head start on planning for your next cycle.

2. Back to the Beginning

- Look at the Google Doc where you completed your SMART goals, and compare it with the DONE list on Trello.
- How many cards did your group set out to do this cycle?_____ How many did you complete?_____

- Did your group make sweeping changes or updates midstream? Why?
- On a scale of 1-10, how well do you think your group scoped their work this week? _____ Should you have been more ambitious? Were there many items you didn't get to?

3. Submit a group summary

Write a succinct but thorough synopsis of your discussion. Submit it to canvas. Link to any major deliverables from this cycle.