



T.A.R.G.E.T. Goals Guide - Employees

3strands LEADERSHIP

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We encourage you to consider our book, **The Company Culture Challenge** ([available on Amazon](#) and other top booksellers) to learn a 7-step strategic plan to becoming a better leader and improving your client experience.

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Goals are a powerful tool that you can use personally and professionally to reach your potential and realize your dreams. There are three challenges to writing and achieving meaningful goals:

1. How to write clear, measurable goals;
2. How diligently you pursue your objectives; and
3. How you track your progress through to completion.

This Guide introduces you to our relatively easy, proven way to write, pursue, and complete meaningful goals more often. We call this writing and pursuing **Goals That Work**, based on the *Success With People* system.

Your manager is giving you an awesome opportunity to participate in the process of defining and pursuing goals for you to thrive in your current role and develop your professional skills.

This Guide provides a step-by-step process for you to learn how to define your goals more clearly, pursue them more diligently, and achieve them more often. Here is the information you will learn:

1. Goal Format
2. Goal Writing
3. Goal Development Meeting
4. Document Progress
5. Accountability

1. Goal Format

The first step is to understand from your manager how your company is pursuing goals.

- a) **Goal Hierarchy:** Your goals are linked to your manager's objectives, which link to the goals of your manager's supervisor, etc. until they connect with your company's goals for the time period.

Take the time to understand what your manager is trying to achieve, and how that relates to the objectives of their boss(es) and your company overall. This helps you comprehend how your work is contributing to your company's success.

- b) **Number of Goals:** Major goals are typically defined at the beginning of the year and scheduled to be complete by year end. We recommend you have the following three goals annually or in any given performance review period:
- Financial (revenue or cost savings)
 - Client Experience (including internal customers, such as other employees)
 - Professional Development (for you)
- c) **Clear and Measurable:** Be prepared to avoid passionate words and use specifics when writing your goals. For instance, a goal such as *“Implement our solutions flawlessly”* sounds admirable, but how do you measure that? It is great to strive for perfection, but the fact is human beings are involved so *“flawlessly”* is impossible. A better way to write this goal would be: *“To implement our solutions on schedule with minimal errors so our customer satisfaction rates are 90 percent or higher.”*
- (How to write clear, measurable goals is discussed in #2 – Goal Writing.)
- d) **Triple Checklist:** After you write your goals, consider whether they pass our Triple Checklist test:
- The responsibilities are within your authority.
 - The desired outcomes can be observed or measured during your performance review period.
 - The tasks are achievable based on your skills, knowledge, resources and/or tools.
- e) **Accountability:** We recommend a brief weekly meeting with your manager to discuss how you are progressing towards achieving your annual goals. Well-written goals are a great start, but success is achieved in stages. Confirm with your manager a schedule of follow-up so you have the support and the accountability you need to win. We explain our process in #5 – Accountability.

2. Goal Writing

Goals must be written so that they are realistic, clear, measurable, reside in a hierarchy and weighted for priority.

- a) **Writing Measurable Goals:** Goals should be written in a clear, measurable way by following the acronym "T.A.R.G.E.T.[™]" from the books, *The Company Culture Challenge* and *Success With People*. Start with the preposition "To" and follow it with an "Action verb." Next add a "Realistic Goal" area or focus. Then add an "Effective measure of success" and close it with the "Time for the goal to be completed."

T	To (the preposition)
A	Action verb
RG	Realistic Goal to be achieved
E	Effectively measure whether the goal has been achieved
T	Time or date for the goal to be completed

- i) The due dates are important. One sales guru, T.C. Michalak, likes to say, "A goal without a timeline is not a goal – it's a wish." Each goal must have a realistic completion date with your work finished on schedule.
- ii) Here is an example of a clear, measurable goal written in the T.A.R.G.E.T. format:

To increase consultant utilization rates to 78 percent for the quarter.

To begin:	To
Action verb:	increase*
Realistic Goal:	consultant utilization rates
Effective measurement:	to 78 percent average
Time bound:	for the quarter.

NOTE: If you want to make the goal statement a bit more direct then drop the first preposition "To." Then this goal becomes: *Increase consultant utilization rates to 78 percent for the quarter.*

Try to write goals so the positive contribution to the company and/or your customers is clear when the goal is achieved rather than a negative.

TARGET goals are consistent with the SMART method of goal writing, however, TARGET goals are easier to write because they define how to write the goal *in a sentence*.



- b) **Milestones:** We recommend goals have 2-5 milestones or key tasks that must be completed to fully accomplish each objective. This provides you a step-by-step approach to achieving your goals in a clear, measurable way.

List your milestones in order of priority or by due date.

For instance, here is a sample Financial goal for a sales person:

70% Close \$1M in 2014 services and subscription revenue:

- Monthly sales quota:

January: \$ 30,000	July: \$ 50,000
February: \$ 45,000	August: \$ 50,000
March: \$ 50,000	September: \$ 100,000
April: \$ 75,000	October: \$ 100,000
May: \$ 100,000	November: \$ 150,000
June: \$ 100,000	December: \$ 150,000

- Submit and gain approval of a March – December Marketing Plan by January 31. Then follow-up with others to hold them (and yourself) accountable to fulfilling the Plan as agreed.

- Maintain a 75-25 balance of revenue from new Clients versus existing Clients quarterly.

- c) **Hierarchy:** Write your goals to support your boss achieving their goals and then link your goals to theirs. If other people report to you, or others share responsibility for helping you achieve some of your goals, then be prepared to have them link their goals to your objectives.

- d) **Weighting:** Use goal weighting to prioritize certain goals over others. For instance, assume you are a salesperson with three goals (Financial, Client Experience, and Professional Development):

- Close \$1 million in revenue by year-end.
- Have a consistent Client Experience score of 9 monthly.
- Complete the LEADERSHIP *Essentials* Behavioral Selling course by October 1 of this year.



Although the Client Experience Score is important and you will gain from completing the sales course, neither of those goals are important if you do not meet your \$1 million sales quota.

Therefore we suggest weighting these goals like this to emphasize the goal to close \$1 million in sales is significantly more important than the others.

Close \$1M in sales	70%
Client Experience Score	20%
Complete Selling course	<u>10%</u>
Total	100%

IMPORTANT: Do not weight all goals a similar amount, such as 35% - 35% - 30%. Have one that is significantly more important and try to have different weighting for the remaining two. In reality, one goal is most important; one is second in priority; and one is less crucial, although still necessary to fully succeed.

Here are two examples of how to write Goals:

EXAMPLE #1 – Systems Assurance Support Engineer:

50% Help our Company achieve its financial objectives:

- Meet our SLA Goal a minimum of 90% of the time.
- Maintain personal workload at 80% or higher billable to capacity ratio on an average daily basis.
- Complete tasks within established budget.

30% Take ownership for Client relationships and their satisfaction:

- Obtain one written testimonial from clients per quarter.
- Conduct monthly visits to businesses and write a positive and negative experience review (analyze touch points) and share my findings with the team during monthly meetings.

20% Develop my skills to consistently achieve my most important objectives:

- Gain specific experience with server administrative duties defined by my manager quarterly.
- Complete one hour training monthly for LabTech and/or ConnectWise.
- Achieve Microsoft MCTS: Windows 7, Configuration by end of Q2.
- Achieve SonicWALL Security Administrator (CSSA) by end of Q4.



EXAMPLE #2 – Account Executive:

50% Achieve or exceed assigned revenue quota:

- Focus on MSP business with target of 50% of all sales:
 - ✓ All new business signed in Q4 should have at least 50% of total contract be managed services.

30% Client satisfaction rate of 90% or higher:

- Obtain one written testimonial per quarter.
- Monthly touch point with all Clients.

20% Professional development goals achieved on time:

- Technical sales and management training:
 - ✓ Attend CharTec Academy in Q2.
 - ✓ Microsoft Sales certification in Q3.
 - ✓ Attend general sales training (i.e. Sandler) by end of Q4.
- Participate in all applicable Company trainings.

3. Goal Development Meeting

Your manager meets with you discuss and develop your goals. This meeting typically takes place in November-December or another time prior to a new calendar or fiscal year, but you can start working on your goals anytime.

This is an exciting opportunity for you to work on “stuff” that is really meaningful to you! The process of defining your goals is up to your manager, but we suggest the following:

- a) Obtain your manager’s goals.
- b) Read them and make certain you fully understand what your boss has agreed to do, how they plan to do it, and why it is important.
- c) Reflect on your current job responsibilities. Based on your duties, how can you help your boss achieve their objectives?
- d) Write three draft goals for yourself, one Financial, one relating to Client Experience, and one involving your Professional Development. Here are some thoughts on how to define up to a maximum of five milestones or key tasks related to each goal:

- Financial
 - ✓ How do I currently increase revenue and/or profit that I want to continue doing, or maybe should do more of?
 - ✓ What is my revenue and/or profit goal and how will I achieve it?
 - ✓ How can I reduce increased spending without compromising our services?
 - ✓ What process can I improve that can help reduce costs for our company?

- Professional Development
 - ✓ On-the-job training (mentoring, cross training, job shadowing, special projects etc.)
 - ✓ Specific learning objectives (attending seminars, certifications, etc.)
 - ✓ Required certifications or learning to advance in my job, or qualify my company for a vendor program

- Client Experience
 - ✓ What current process or procedures can I improve to increase effectiveness or efficiency for the benefit of our Clients?
 - ✓ How do I measure myself to know that I am meeting or exceeding our Client Experience goal?

Remember, your goals should relate to and support the achievement of your boss's objectives because their goals help the overall company accomplish its objectives.

e) The Meeting:

1. Email your boss your draft goals at least one day in advance of your meeting so they can consider them and be prepared to provide valuable feedback.
2. Ideally your manager lets you take the lead in discussing each of your goals, and your other work on your Strategic Plan, if applicable. However, let your manager lead the meeting if that is their preference.
3. Discuss how your goals are consistent with your team or company objectives, aligned with your company's goals, and your milestone/tasks are realistic.
4. Confirm your goals are realistic, clear, measurable, reside in a hierarchy and weighted for priority.
5. Agree with your manager on a final version of your goals.



6. Have a complete, written understanding of the support you can reasonably expect from your manager to help you achieve your objectives, including how often your manager will follow-up with you.

4. Document Progress

Monthly or quarterly go into your company's MANAGETOWIN site to enter Goal Progress Notes that update the status of your goals and add information confirming the work you are doing and/or challenges you are facing. One note per quarter per goal is fine.

5. Accountability

We recommend this process for following-up on your goals with your manager, or even working alone as an individual. You and your manager may develop a different schedule, but anything less than bi-weekly accountability is less than we would recommend.

- **Weekly Accountability:** Schedule time weekly to review your progress. Ideally this meeting is with your boss, but there may be goals you are pursuing on your own. Accountability from your manager and individually on your own both have value.

Goals without accountability are a recipe for failure. Therefore set time aside on your calendar as recurring events for follow-up meetings with your boss, and/or on your own to confirm you are making progress and overcoming challenges.

- **Weekly W.I.N.:** Starting before the first week that you begin to pursue your new goals, take time alone to define your Weekly W.I.N. (What's Important Now). These are the three most important milestones or tasks you must complete during the upcoming week to move closer to achieving your annual goals. (Never define more than three strands so you stay focused.)

Your Weekly W.I.N. should be listed in order of priority.

The Weekly W.I.N. is a simple follow-through system of 3strands LEADERSHIP, which was inspired by Ecclesiastes 4:12:

"Though one may be overpowered, two can defend themselves. A cord of three strands is not quickly broken."

Individually these activities may not seem very important, but collectively they are crucial small steps towards achieving meaningful work each year. Over time the collection of these three weekly activities also protect you from failure or ongoing mistakes, systematically build a fortress of success, and strengthen your defense against competitors and anyone who might question your productivity.

The discipline of weekly achieving Weekly W.I.N. is a strong 3strands, climbing "rope" (or cord) to reach your vision of success (whatever you define success to be).

Here is an example of a Weekly W.I.N. email:

Week of August 27, 2014

1. Complete training materials
2. Complete final two Strategic Plans
3. Track work in ConnectWise:
 - a) Enter all time in ConnectWise
 - b) Confirm the Smith project process is entered correctly
 - c) Confirm contacts in ConnectWise are our primary Client contacts

Week of August 20, 2014

1. Enter time for all of my work in our PSA software - **COMPLETE**
2. Get Ralph to complete all of his Strategic Plans this week - **COMPLETE**
3. Complete final edits to all current consulting support documents - **COMPLETE**

- **Goal Review:** The first step of your weekly meeting is to review your current annual goals.
 - ✓ If this is your first meeting, then decide what three key actions you plan to take during the upcoming week that contributes to achieving one or more of your goals, milestones, or key tasks. These are your draft Weekly W.I.N., subject to your manager's approval.
 - ✓ If this is a subsequent meeting, then start by confirming your work on the prior week's Weekly W.I.N. as explained below.
- **Email Draft:** If your weekly meetings include your manager, then email your draft Weekly W.I.N. to your boss at least one day before you meet to discuss them. This gives them time to review your Weekly W.I.N. and prepare valuable feedback. If you are holding yourself accountable and no manager is involved, then you can follow this process on your own without any email.

- **Consistency:** Each week have a meeting on your own and/or with your boss late Friday, over the weekend, or early Monday morning to:
 1. Confirm you completed the Weekly W.I.N. you defined for the prior week.

NOTE: There are very few valid excuses for not achieving your Weekly W.I.N. so make each task realistic. It is better to plan only one major activity and then two minor ones, and complete them all with excellence than fail to complete one of more of your activities ("strands").
 2. Reflect on what you accomplished, and in particular:
 - What did you learn that can help you or others?
 - Do you need help, and if so, from whom and when?
 - Are you on track to achieve your annual goals?
 3. Finalize your Weekly W.I.N. for the upcoming week.
- **Confirmation:** If your boss is part of your weekly meetings, then you must confirm your Weekly W.I.N. with them. They might suggest or even require changes to your Weekly W.I.N. such as rewording or a shifting their order of priority, but that is okay. They are your boss at work, right? They have good insights, plus you want them to confirm you are focusing on what is most important. Involving your boss also improves their understanding of how diligently you are working to serve your company.
- **Calendar It:** As we mention above, you should set aside time in your calendar to complete each of your Weekly W.I.N. These entries protect time in your schedule to do the work, and allow you to balance this work throughout your week rather than doing the work at the last minute or allowing unexpected needs to overwhelm you.

Conclusion

Leadership often appears to be glamorous, but to succeed requires you to often do thankless, disciplined work that is filled with pressures to compromise values and standards.

Keep your goals in front of you weekly, if not every day. Complete your Weekly W.I.N. regularly and you will enjoy your work more. **It is FUN to achieve results.** Work becomes more personally fulfilling and financially rewarding.

Thank you for the opportunity to serve you and your organization.



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