

SETTING & ACHIEVING GOALS

"Goals are like a magnet – they pull. And the stronger they are, the more purposeful they are, the bigger they are, the more unique they are, the stronger they pull."

--Jim Rohn

What

A goal cycle involves a series of steps to set and achieve 3-8 top-level measurable goals within a year. These goals are strategically important for the organization's future success. Teams then set 1-3 annual goals aligned with these top-level objectives and take actions to achieve them. Despite the presence of established strategic planning and budget cycles in many organizations, the importance of a goal cycle is often overlooked.



Why

Integrating a goal cycle helps organizations align efforts and foster ownership among stakeholders, leading to the achievement of specific, measurable goals that directly support strategic priorities. It also helps to:

- Clearly define goals which serve as guiding lights, measuring success and uniting everyone around common purposes.
- Motivate and inspire when setting challenging; yet achievable, goals fostering a sense of pride in the progress and accomplishments.
- Drive collaboration, energize us to be resourceful and creative, and encourage us to leverage our knowledge and skills for success.

Activity

Instructions:

- Take a few moments to reflect on a goal, improvement, aim, KPI you wish to achieve with your team within the upcoming year.
- Make a note of that goal, improvement, aim, or KPI.
- Put it in a safe spot because we will revisit it later in this talk.

How

Setting and Achieving Goals
A Leadership Commitment

A GOAL CYCLE is a defined process that guides the activities of setting and achieving goals.

Meaningful goals compel us to:

- work together
- be energized, resourceful, and creative
- use or seek out the knowledge and skills needed to succeed

THE GOAL CYCLE HAS THREE MAIN PERIODS

- PRE-CYCLE PERIOD**
A systematic process for setting measurable goals that are aligned with the organization's key strategic priorities.
Example Goal - Our clinic will reduce overtime expenses from \$60,000 last fiscal year to \$25,000 or less this fiscal year.
- GOAL PERIOD**
A cadence of consistent actions taken toward being accountable to - and progressing toward - our established goals.
- POST-CYCLE PERIOD**
A time to celebrate what we've accomplished and to capture the lessons we've learned from goals not achieved.

UNLEASH YOUR GOAL SETTING SUPERPOWERS WITH THESE SUPER POINTERS

- SET "STRETCH" GOALS.** Goals that are a bit challenging, yet possible to achieve, are motivating, inspiring, and help us to feel proud of our progress and accomplishments.
- INVOLVE STAKEHOLDERS.** When we involve employees and/or other stakeholders in setting goals, we establish a "social contract" toward working together to achieve the goal.
- LESS IS MORE.** More goals don't equate to more success and progress. When we set fewer goals, each one can be set at a higher level of difficulty, so we can move higher and faster towards the most important things.

CAPSTONE
Leadership Solutions, Inc. | capstoneleadership.net | **Setting and Achieving Goals**
One of Nine Leadership Commitments

A GOAL CYCLE is the defined process that guides an organization's activities of setting and achieving goals. The goal cycle has three main periods:

- **The pre-cycle period** - also known as the "getting ready" period. This is dedicated time for setting organization, team, and department goals and deciding on the action steps and resources needed to achieve them.
- **The goal period** - an entire year in which goals are broken down into the tasks and activities necessary to achieve them. For most organizations, the annual goal period is defined as their fiscal year. During this period:
 - Quarterly mini-goals and quarterly action plans are established, adjusted as necessary, and acted upon. This results in frequent celebrations of progress and milestones.
 - Department employees meet regularly to determine action steps and assign responsibilities. These are opportunities to bring ideas forward and take teamwork to the next level.
 - You'll also want to keep your sights on the goal metrics. These numbers help you to know if you're on track to meet the goals and guide adjustments to the actions plans.
- **The post-cycle period** - a time to celebrate what has been accomplished and to consider what lessons have been learned from the recent goal period that help to get even better at using the goal cycle to improve, grow, and succeed.

PRE-CYCLE		Strategic Plan Updates Organizational, Departmental, & Team Goals 1st Quarter Goals & Action Plans Budgets	CAPSTONE Leadership Solutions, Inc.
Leadership Training	QTR 1	Activity to Accomplish Action Plans Measure and Transparency Report Develop next Quarter Goals & Action Plans Monthly Accountability Meetings	Celebrations!
Employee Training	QTR 2	Activity to Accomplish Action Plans Measure and Transparency Report Develop next Quarter Goals & Action Plans Monthly Accountability Meetings	Celebrations!
Leadership Training	QTR 3	Activity to Accomplish Action Plans Measure and Transparency Report Develop next Quarter Goals & Action Plans Monthly Accountability Meetings	Mid-Year Conversations
Employee Training	QTR 4	Activity to Accomplish Action Plans Measure and Transparency Report Develop next Quarter Goals & Action Plans Monthly Accountability Meetings	Celebrations!
POST-CYCLE		Post Mortem Reviews	Celebrations! Annual Evaluations

What the goal cycle looks like in practice:

STEP 1: Seek out and review information on the organization's next year strategic plan and/or annual organization goals (or input from senior leader(s) related to the organization's top strategic initiatives).

STEP 2: Review of Department-Specific Data – Performance/Opportunities

Consider the measurements that best capture the operations/performance of your department. Look for opportunities for improvement (based on current result, how the result is trending, and/or how the result compares to others/benchmarks)

Category/Pillar	Specific Measurements	Notes
Finance	1. 2. Ex: Overtime expense, Expense/Visit	
Access & Growth	1. 2. Ex: Revenue, Patient Volumes	
Patient Experience (Service Excellence)	1. 2. Ex: "Willingness to Recommend"	
Safety & Quality (Care Delivery)	1. 2. Ex: Medication Errors, Patient Complaints	
People	1. 2. Ex: Turnover, Employee Engagement	
Other	1. 2.	

STEP 3: Brainstorm Opportunities for Aligned Department Goals



Engage department employees in this process during a department meeting which includes overviewing the information in Step 1 & 2 and then gathering their input as to what they consider to be high priority, and aligned, improvement opportunities.

AGENDA FOR DEPARTMENT GOAL SETTING MEETING

Department: _____ **Meeting Date/Time:** _____

Meeting Objective - To gain input in drafting the department's 1-3 annual department goals.

Overview: Organization's strategic priorities and/or annual organization goals

Overview: Key baseline department data and trends

Brainstorming & Decisions: Options for 1-3 department goals

How best can our department contribute to the organization's top strategic priorities and/or goals? What are our unique opportunities to improve? What should our 1-3 department goals be for this next year?

Next Steps

Overview: how and when draft goals are reviewed and approved, how goal progress is monitored and reported on visual communication boards, department meetings, monthly accountability meetings, how and when action plans are developed, carried out, and updated

Meeting Evaluation

Index cards – on one side “what you thought was positive and went well”; on the other side “what could have been changed/different to make this goal setting meeting and/or process even better.”

***Note:** while brainstorming and deciding on 1-3 goals, often employees will start offering up solutions or suggestions to actually achieve the goals (which is STEP 5 – after goals are approved). If desired, and time allows, these could be “captured” (and with the understanding that possibly that goal may be amended or replaced in the final goal review process). Otherwise, the meeting needs to be facilitated with the primary objective of drafting of the department's 1-3 goals.

STEP 4: Complete the following information related to DRAFT 1-3 Department-Specific Goals by engaging department employees in the process.

DEPARTMENT: _____ **Director:** _____

EXAMPLES:

Increase/Decrease	WHAT	FROM (Baseline)	TO (Goal)
To Increase	Average Visits Per Provider Per Day	from 14.5 last year	to 16.0 or higher this next year
To Decrease	Absenteeism	from an average of 10 call-ins per pay period last year	to an average of 5 or less call-ins per pay period this next year

DRAFT DEPARTMENT GOAL #1:

Increase/Decrease	WHAT	FROM (Baseline)	TO (Goal)
Why is this goal considered to be one of the top priorities to be achieved by your department? How is this goal aligned with the organization's top priorities?			
<ul style="list-style-type: none">• This goal is set "on the higher end of difficulty"• Employee input was received			

DRAFT DEPARTMENT GOAL #2:

Increase/Decrease	WHAT	FROM (Baseline)	TO (Goal)
Why is this goal considered to be one of the top priorities to be achieved by your department? How is this goal aligned with the organization's top priorities?			
<ul style="list-style-type: none">• This goal is set "on the higher end of difficulty"• Employee input was received			

DRAFT DEPARTMENT GOAL #3:

Increase/Decrease	WHAT	FROM (Baseline)	TO (Goal)

Why is this goal considered to be one of the top priorities to be achieved by your department? How is this goal aligned with the organization's top priorities?

- This goal is set “on the higher end of difficulty”
- Employee input was received

Turn those goals into goal statements using the SMARRT Goal Format:

- From X to Y by when?
- Fewer goals, higher end of difficulty.

SMARRT Goal Format:

S = Specific. Unclear & vague are unkind.

M = Measurable. Can you find the data you need to measure your goal?

A = Actionable. Do you know what actions you will take right away? This likely represents a great goal for you.

R = Relevant. Can you write a sentence that states the relevance of this goal?

R = Ripple Effect. What other benefits to your team and/or department will happen as a result of this goal?

T = Time-bound. In what specific timeframe are you going to achieve this goal?

Activity

Turn to a partner at your table. Pull out the goal, improvement, aim, or KPI you want to work on with your team. From what you have learned about writing goals, how would you now draft that into the SMARRT format?

What is your next step?

STEP 5: Before the start of each quarter, develop targeted mini-goals and a detailed action plan for each approved goal (involving staff at Department Meeting)

QUARTERLY ACTION PLAN FOR GOALS

Annual Goal: _____

Quarterly Mini-Goal: _____

Action Steps	Person(s) Responsible	Target Completion Date

STEP 6: Goal Accountability and Attainment - A cadence of consistent actions taken toward being accountable to and achieving (or making great progress toward achieving) the established goals.

Points of emphasis:

- Track and transparently report Goal metrics to staff (via communication board, department meetings) at monthly - or more frequent – intervals based on data availability
- Discuss Goal metrics and action plans at Monthly Accountability Meetings with your leader each month
- Update quarterly action plans and mini-goals before the start of each quarter (or monthly, if preferred) by engaging staff at department meetings
- Celebrate achievement of mini-goals and progress made on quarterly action plan(s) at appropriate intervals throughout the year

Daily	Monthly
<ul style="list-style-type: none">● Huddles● Rounding● Feedback	<ul style="list-style-type: none">● Value(s)/Standard(s) of the Month● Accountability Meetings● Staff Meetings
Weekly	Quarterly
<ul style="list-style-type: none">● "Friday-Five"-type communications● Thank You Note(s)● Vital Time	<ul style="list-style-type: none">● Goal Action Plans Evaluated/Updated● Purposeful Celebration(s)● Leadership Training● CEO-Employee Forums
Bi-Weekly	As Needed or Scheduled
<ul style="list-style-type: none">● Visual Communication Boards● Goal Metrics Review and Validation Activities	<ul style="list-style-type: none">● Positive Coaching and/or Correction● Annual Employee Survey● Annual Evaluations● Employee Training

STEP 7: Post-Cycle Goal Review

For each **established goal** that was the target of action in the most recent goal period, consider:

- Was the goal achieved (measurable evidence based on the specific metric targeted)?
 - If yes,
 - How (and how soon) will this be celebrated? Are there specific individuals, that in addition to a group celebration, can be recognized for their specific contributions to this goal? How (and how soon) will they be recognized?
 - What lessons did we learn in the process of achieving this goal that may assist us in being successful in achieving future goals?
 - If no,
 - Are there still opportunities to celebrate the progress and milestones that were made toward this goal? How (and how soon) will this be celebrated? Are there specific individuals, that in addition to a group celebration, can be recognized for their specific contributions to the progress made toward this goal? How (and how soon) will they be recognized?
 - What got in the way of this goal being achieved? (Consider using the 5-Whys technique or a Post-Mortem Review Worksheet - available from many sources on-line). What lessons did we learn in the process of setting and working to achieve this goal that may assist us in being successful in setting and achieving future goals?

Independent Takeaway Activity

Elements of a Robust Goal Cycle Checklist - Which tactic(s) is your organization missing? Check all that apply.

- Strategic plan update
- Organizational goals (3-6) aligned with key strategic priorities
- Structure of teams with 1-3 goals aligned to organizational strategies (working on the organization-wide priorities)
- Department or Service Line goals (1-3 for each department or service line) aligned with organizational goals (working on the department/service-line specific priorities)
- Budget Process - Budgets/Resources Aligned to Goals
- Quarterly Action Plans with established quarterly goals
- Quarterly Leadership Development (what do leaders need to learn to be successful in achieving goals?)
- Semi-Annual Employee Development (what do employees need to learn to be successful in achieving goals?)
- Measurement & Reporting – “Metric Monday” (every other Monday)
- Transparency Activities - communication boards, town hall meetings, staff meetings, board and other applicable committees/teams
- Monthly Accountability Meetings
- Vital/Sacred Time – Established blocks of time dedicated to working toward achieving goals (Metric Monday and Monthly Accountability Meetings are two examples of this)
 - Evaluations and Mid-Year Conversations
 - With or without link merit pay or bonuses
- Celebrations, Recognition, Awards

Even if your organization does not have a goal cycle, you can still set one for your own department/team.

Closing

I'd rather aim high and miss, than shoot low and hit. Let's remember that goals aren't just dreams; they're the roadmaps to success. Aim high, stay focused, and take consistent action.

QR CODES/LINKS FOR RESOURCES:



[**eLearning Course: CapstoneEDU – Setting & Achieving Goals**](#)

Leaders in Partner Organizations – contact your Initiative Champion

Leaders in Non-Partner Organizations – access more information on course details and pricing via the QR Code/Link

Reflection/Notes: