

Blueprint

WRITING GOALS

Average Reading Time:
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WHAT ARE GOALS?

Goals are statements of what an organization or an individual intends to reach during a certain period of time. They set out main targets for achievement.

Is there a real need for you to establish goals? Here is a simple test to see if they are really needed in your area: (choose one answer, then turn to the page number opposite your choice).

1. Somebody “upstairs” says you should have written goalsTurn to Page 11.
2. My performance and results directly affect the survival and prosperity of the organizationTurn to Page 5.
3. I put in a hard, fast day with long hours to get done what needs to be doneTurn to Page 8.

YOU ARE NOT FOLLOWING INSTRUCTIONS!

Nowhere are you instructed to turn to this page.

REMEMBER — We said this would not be like any regular book where you follow the pages in sequence. Instead, you will skip around — depending on the choice you decide to select at each question.

Now turn back to Page 2 and select the number of the page you should be on.

You have said goals are:

“A list of important day-to-day activities which you must perform.”

No. goals are more than daily duties or acts. They really point to what our daily duties add up to over a long period of time. And, once you establish goals, you may decide on quite a different list of day-to-day activities than you were performing before.

Goals help you to back away from your daily jobs and define what you are really trying to accomplish. We sometimes get so wrapped up in the details of our job that we lose sight of the reason why we are doing it.

Turn back to Page 5 and take another choice.

In deciding if you need to establish goals — you have chosen the statement:

“My performance and results directly affect the survival and prosperity of the organization.”

Right you are! In the final analysis, reaching your goals and the organization’s goals can result from nothing more than the sum total of all our directed efforts. Effective performance and results from each of us are needed both for survival and prosperity.

Okay? But just what are goals, anyway? What would you say they were? (Choose one answer, then turn to the page indicated next to your choice).

1. A list of important day-to-day activities which I must perform Turn to Page 4.
2. A statement of my intentions to improve the way my job is done Turn to Page 12.
3. A statement of end results which will come from effective performance of my job Turn to Page 7.

You feel that the best stated goal of the three is:

“To try hard to increase quality.”

That’s a good intention to spend some effort — but it’s not a specific enough target to aim at.

What is your quality record now? How is it measured? What is a reasonable improvement? What exactly will you do to get there? How long do you think it will take?

Look how many unanswered questions a statement of intention leaves us with! Let’s try another approach. Turn back to Page 15 and choose another.

You have said goals are:

“A statement of end results which will come from effective performance of your job.”

How right you are! Goals must have specific targets or end results which you set out to accomplish.

Let's think for a moment about what levels should have goals. Where would you say they should be set?

1. Only at the top where the total picture is understood.....Turn to Page 9.
2. At all levelsTurn to Page 13.
3. Only at the first line of supervision where the work is doneTurn to Page 21.

In deciding if you need to establish written goals — you have chosen the statement:

“I put in a hard, fast day with long hours to get done what needs to be done.”

Many are doing this. But the big question is: “How do you know that you have really accomplished something important?” Are you sure that the work you did really needed doing? Was it the most important way to spend your time to support the organization’s goals?

If you are in doubt about any of these questions, perhaps goals would help. Turn back to Page 2 and select another choice.

You have said that goals should be set only at the top where the total picture is understood.

You don't really mean that. You know that our broad directions and leadership should come from the top — but that each of us must make our plans to contribute to the organization's accomplishment. Otherwise, we don't have a team all pulling in the same direction.

Turn back to Page 7 and make another choice.

Please turn to Page 22.

In deciding if you need to set goals — you have chosen the statement:

“Somebody ‘upstairs’ says you should have written goals.”

We certainly won’t argue that this isn’t a reason for writing goals. But if that is the only reason — it really isn’t a good one for you. When we do something only because “someone says we should” we often don’t understand “why” and to us it’s really a waste of time.

But why do you suppose the top management of the organization feels that your working toward goals is so important?

Turn back to Page 2 and take another choice.

You have said goals are:

“A statement of your intentions to improve the way your job is done.”

The road to — you know where — is paved with good intentions that somehow never got done. Intentions are usually so general that we can “set then forget.” It’s quite a different story to set a specific target by a specific date and then check up on ourselves to see what progress we are making.

Turn back to Page 5 and take another choice.

You have said that goals should be set at all levels. Right!

Only in this way are we sure that each supervisor is managing to a purpose and each employee is making a contribution to the total organization's effort.

If the system was perfect, goals would be set at the top and passed down to the next layer of management. Your superior would say: "Here are my goals: What can you do in your unit that will help me in reaching them?" Not all of your goals would then reflect those of the level above you, but some of them would.

But even if your supervisor doesn't set his or her goals or show them to you, setting your own is still the best way to manage your job!

Please turn to Page 14 (next page).

As goals are set down through the organization, they can become much more specific and more measurable. The goals of various people in a professional football team, for example, might look something like this:

Club Owner: To finish the season with the club in first place and a positive return on investment.

Public Relations Officer: To obtain an attendance of 750,000 people at home games for the season.

Coach: To finish the season with a 65% win, 5% tie, 30% loss record or better.

Captain: To win this game by at least a ten point spread.

Right Guard: To take out the opposite guard on at least 70% of the plays.

As you can see, all of these goals are related and the upper level goals are broader.

Turn to Page 15 (next page).

Let's get specific in talking about goals. Which stated goal is best of these three?

1. My goal is to produce a quality product, on schedule, at the lowest possible cost
Turn to Page 20.
2. My goal is to try hard to increase quality
Turn to Page 6.
3. Our average now is ten rejects in every 100 parts manufactured. My goal is to reduce this to five out of 100 within four monthsTurn to Page 16.

You feel that the best stated goal of the three is:

“Our average now is ten rejects in every 100 parts manufactured. My goal is to reduce this to five out of 100 within the next four months.”

Right! This is specific. You know exactly what your target is. You can track your progress from week to week as you are reaching it. You know when you have made it.

Being specific as to our targets is the most important step — and the hardest step to take in setting goals. But the success of our organization in going down the same road together depends, in large part, on each of us becoming more skilled in knowing what goals to set and in knowing how to measure our progress toward them.

Turn to Page 17 (next page).

In these three examples, which one(s) have a useful yardstick of accomplishment?

1. Increase time spent in planning the job and organizing for it to be done. Now spend 1/2 hour a week. In three months will be spending at least three hours a week Turn to Page 22.
2. To reduce labor-hours in final assembly by 600 labor-hours by December. With six months to go, next month's labor-hours should be down 100 Turn to Page 28.
3. To increase the number of cost saving suggestions from my unit. To do so, for the next two months I shall meet with three small groups of employees each week to encourage their participation Turn to Page 10.

After setting your goals, you say the next step is:

“To discuss them with your supervisor.”

Talking them over with him or her is a good idea — but the discussion will be even better if you have thought through how you are going to reach your goals.

Turn back to Page 23 and choose another answer.

You felt it was reasonable to enroll in college evening courses to find out how labor costs are generated and recorded in your unit.

Oh, come on now. We put this answer in as a “gag.” Bet you turned to this choice just to see what we would say.

Turn back to Page 31 and select another.

You feel that the best stated goal of the three is:

“To produce a quality product, on schedule, at the lowest possible cost.”

The trouble with this as a goal is that it is much too broad. It is like being for motherhood and the flag and against sin.

If this were your goal, you would have no target to aim at and no way of knowing in three months, six months or a year whether you made it or not.

Turn back to Page 15 and try again.

You have said that goals should be set only at the first line of supervision where the work is done.

But if only the first line supervisors set goals, do you suppose they would “add up” to accomplishing the organization’s purpose? Probably not!

Turn back to Page 7 and select another choice.

You may have selected any of the three examples to reach here. The fact is — no one is “expert” enough to definitely say how each of your goals should be measured. The important thing is that you try to set positive measurements of results expected and the time period.

Here are some possibilities:

- Dollars
- Number
- Ratios
- Quantity
- Tolerances
- Percentages
- Headcount

Turn to Page 23 (next page).

After setting specific goals and a specific time period for accomplishing them, what's the next step?

1. To decide on a plan to meet the goals in the time period set Turn to Page 29.
2. To put the goals away until the target date Turn to Page 26.
3. To discuss them with your supervisor Turn to Page 18.

You have said an activity to accomplish a personal goal would be:

“To increase your understanding of cost generation and recording in your unit 60% over the next three months.”

There are two things wrong with choosing this answer. First, that is not an activity but a statement of a goal. Second, the point we were making was that you could not be as exact (“60% increase in understanding”) with personal goals as you can be with work goals.

Reread Page 31 carefully, then choose another answer.

A word to the superior:

Your subordinates' goals will be based partly on those you set, and partly on specific accomplishments which they believe will improve their own operations and own abilities. It is the process of setting goals and having them approved by the superior that brings about real efforts to achieve the desired improvements and stretch the capabilities of employees.

When you initially review the goals your subordinates have set, you should make sure that they are challenging but attainable. Also, you should review their progress as often as possible, to maintain interest and to assure that improvements maintain a reasonable level of attention among the requirements of daily operations. Setting goals should cause lasting improvements in every position every year.

If your subordinates learn to set goals and work toward them, they will have learned a practical principle of management which achieves results. But make no mistake about this — the interest of your subordinates will depend largely on your interest in using goals in managing.

Turn to Page 27.

After setting your goal, you say the next step is:

“To put the goals away until the target date.”

Whoa now! If you put them away after going only this far, the chances are pretty slim that you would ever reach your goals.

No, you have left out a key element. Turn back to Page 23 and choose another answer.

That's about all there is to know about setting goals. But after setting your goals, making a plan for accomplishing them and charting your progress until the time you set for accomplishment arrives, NOW what?

1. Review results and decide on further action
Turn to Page 37.
2. Set new goals and begin to work on these
Turn to Page 32.
3. Be sure to file your goals in a safe place
Turn to Page 33.

Please turn to Page 22.

You said that after setting specific goals and a specific time period for accomplishing them, the next step is:

“To decide on a plan to meet the goals.”

Right! Every goal must have a plan or method to reach it. Makes sense, doesn't it?

Once you decide on a plan, it's easy to set up a way to track your progress to assure that you are following your plan.

When you can set specific targets, a plan and a method to control or track “how you are doing,” you will really be able to manage your own work. And this is what the organization is striving for! Remember — your controls are for you to keep track on how you are doing.

Please turn to Page 30 (next page).

Up until now, we have been talking only about work goals — improvements in schedule, overtime, etc. But another type of goals concern your personal improvement. To set these goals is important to improve your future performance and advance your growth and career.

What are they like? Here are some examples of personal goals:

- To gain a better understanding of how to communicate with others.
- To find out how other supervisors plan their personal time to plan mine better.
- To learn more about how labor costs are generated and recorded from this unit.

The main difficulty with setting goals about our personal development is that “number” measures may not be available to tell us “how we’re doing.” How are personal goals measured, then?

Turn to Page 31 (next page).

Let's look at the last example — “To learn more about how labor costs are generated and recorded from this unit.” If this were your personal goal, which of the following activities seem reasonable to accomplish this goal?

1. To discuss it with your supervisor and enlist help in identifying the appropriate persons in Finance or elsewhere to talk to Turn to Page 34.
2. To enroll in accounting courses at a local evening school Turn to Page 19.
3. To increase my understanding of cost generation and recording in my unit 60% over the next three months Turn to Page 24.

You have said the last key step is to set new goals and begin to work on these. We like your eagerness but thought you might review your performance first to see how you scored on your previous goals. After that is the time to set new ones.

Turn to Page 37 for a discussion of the review.

You have said the last key step is to file your goal in a safe place.
We hope you never do that!

Instead, we hope you pin your goals up on the wall in your work area — with intermediate targets indicated and your current position. So that you can see “how you are doing” every day.

We had another step in mind for the last key step.
Turn back to Page 27 and make another choice.

To meet a personal goal of learning more about costs in an area, you would suggest a person discuss where to go with a supervisor.

Seems like a reasonable beginning. The point we are making here is that “number” measures often can’t be found to measure (track) progress in personal goals. Instead, the best thing to do is to list actions you will undertake in your plan to help you to meet your personal growth goal.

Now that we have talked about both work goals and personal goals, what they are and how to set them, let’s talk about how many should be set and how long a period they should be worked on.

The upper levels in an organization can realistically set goals for an entire year because their goals are broader. Lower levels should choose the number of goals to be worked on and time period suitable to their level.

Turn to Page 35 (next page).

After you get some experience in setting goals, you will have a better feel for how many to set and the time period to assign to each. Here are some tips:

When a person lists a great many goals, or many which can be reached in a short time, this may be a sign that he is concentrating on minor matters. The bigger, more important problems never get full attention. If you selected a few broad goals and a longer period of time, these would probably cover the broad improvements needed in your job better. When only one or two are selected, they tend to be so broad and general that they can't be measured accurately.

Setting goals for improvements to be reached at different time periods allows an individual to give attention to daily work and concentrate on improvements a "bite at a time." At the same time it encourages the individual to work toward several long range goals.

Remember — list the goals you consider important and pressing. Good judgment and your individual circumstances will tell you "how many" and "over what period."

Turn to Page 36 (next page).

Once you have set goals, decided on a plan and arranged for tracking, the next step is to discuss these with your supervisor. There are three purposes in discussing your goals with your supervisor:

1. To make sure your goals fit in. The goals of the whole group should blend together and fit into the goals of the department and the company.
2. To get the supervisor's opinion on how realistic your goals are. They should not be reached too easily nor be impossible to reach.
3. To get support where you will need it to accomplish your goals.

Now a word with those of you who have supervisors reporting to you.

1. If you have supervisors reporting to you
Turn to Page 25.
2. If you don't but want to see what we are going to tell them Turn to Page 25.

You have said the last key step is to review results at the end of the period and decide on further action.

That's right!

If you have been specific in setting clearly defined goals, they can be reviewed at the end of the period to see if you have hit your targets. Questions such as these will help in your review.

Did you meet your goal or not?

If you did —

- Did you meet it more easily than expected?
If so, why?
- Did you find it harder to reach than you expected?
If so, why?

If you did not meet your goal -

- Should more time be provided?
- Should the goal be changed?

What goals should you set for the next period?

Now you know the whole process of setting goals. The next important step is for you to set your goals. Get a piece of blank paper — and turn to the next page (38).

If your superior shows you his or her goals, you will be able to select those toward which you will be able to make a contribution. You can then make plans for specific accomplishments and arrange “tracking” and reporting. But what goals should you set in addition to these?

If part of your activity is planned by an outside group and you follow what they require (such as schedules and dollar or headcount budgets), your compliance need not be listed as a goal. It is quite appropriate for you to list improvements you intend to make under these plans.

For your other goals, look broadly at the function you perform. What would increase the efficiency, the effectiveness and the value of it to the organization? What major problems should be overcome?

Here are some suggestions for areas in which you might set specific goals:

1. To adapt control devices at every organizational level which will assure rapid and accurate feedback of actual conditions to the manager responsible.

Turn to Page 39 (next page).

2. To streamline your organization by reducing the number of levels and increasing the number of people reporting to each manager.
3. To increase the effectiveness of your working relationships throughout the organization through planned efforts to improve two-way communication.
4. To assure that procedures and paperwork systems under your direction are appropriate to our size and complexity of operation and not overburdening or too costly.
5. To investigate the major areas of costs under your control, set an appropriate goal for reduction (state percent or dollar amount) and establish a plan for accomplishing it. Targets in each area will vary; set one for your organization which is realistic, but difficult to obtain.
6. To conduct at least one major depth study (into an area which had been troublesome) to increase technical, manufacturing or management efficiency.

Turn to Page 40 (next page).

7. To have a plan to coach subordinates on performing their job more efficiently; to schedule periodic discussions with each subordinate on job progress.
8. To plan and carry out a program of self-improvement. (This can be based on a wide variety of activities such as reading, attendance at some of the many evening programs offered by colleges in your community, finding out more about activities that interface with yours, etc.)








Have you begun to list your goals?

If not, do it now!




OK? Now let's talk about how you can track your progress. On the next page is a suggested format. If you find another format which suits you better — fine, use it. But keep it simple.

Turn to Page 41 (next page).

FORMAT FOR TRACKING

(3) TIME	J	F	M	M	A	M	J	J	A	S	O	N	D
(1) COST REDUCTION													
(2) CONSERVATION SAVINGS (SUPPLIES) (5)	100	200	300	400	500	600	700	800	900	1000	1100	1200	
	90	170	280	420	560								
METHOD STUDIES (4)													
OVERTIME CONTROL (REDUCTION) (5)	5	4.9	4.8	4.5	4.1	3.9	3.8	3.7	3	2.9	2.5	1	
	8	8	7	7	6.1								
INCREASE SUPV. RATIO (5)	9	10	11	12	12	14							
	8	8	9.5	10	10								
STUDIES TO REDUCE SCHEDULE DELAYS													
ETC. (SEE NOTE REFERENCES ON NEXT PAGE)													
(6) RESULTS:													
(7) REPORTING:													

Notes from Page 41:

- (1) Goal: Summary of Statement: - To reduce overhead cost in the supplies area \$100,000 under 1996 budget.
- (2) Plans and Activity: Examples to support goals may also require sub-activities.
- (3) Time Span: Weeks or months during year.
- (4) Milestones:  Start
 Est. Completion
 Completed
- (5) Tracking: To evaluate progress while pursuing your goal may be % complete, cum dollars, hours spent, quantity reduction, etc.
- (6) Results at Completion: Measured improvement by dollars, percentages, quantities, comparison to past performance, etc.
- (7) Reporting: Predetermined period of time for schedule reporting -weekly, monthly, quarterly, etc.

Please turn to Page 43 (next page).

So that's the story about setting goals for improvement, creating a plan for reaching your goals and tracking your progress. Using it will make you a better manager and a better employee.