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Setting goals:
for planning and success

Have you ever heard the saying, "If you don't know where you're going, how will you know when you get there?"

That's the idea behind setting goals. For leaders, they can help plan your business activities. They also provide a way to measure success. When you achieve your goals, you have clear evidence of what you've accomplished, and it helps your organization focus on what's important. This is also true for safety and health. Businesses can set goals in these areas as well as for production, quality, and customer service.

Goals vs. objectives

First, goals are broad. They describe something the organization wants or expects to accomplish, usually in a defined time period. When you set goals, it's a great idea to engage employees throughout the organization to write them. This will increase buy-in and ensure you consider all organizational perspectives when setting them.

Here are a few examples of goals:

- Increase safety training participation this year
- Achieve customer satisfaction scores ≥ 8 by July
- Use strategy to increase website traffic in January

Objectives are steps you take to achieve those goals. Here's an example based on the first goal:

GOAL: Increase safety training participation this year

OBJECTIVES:

- Involve employees in training selection in 2020
- Offer 10 more in-person training classes in 2021
- Use learning management system to track in 2021

These are just a few examples of objectives, but any action you do to achieve that goal counts. Be creative and come up with unique ways your business can use to achieve your goals.

Start SMART

All goals should be SMART—specific, measurable, achievable, relevant, and time bound.

Specific – Avoid vague goals; make sure you are looking for a specific outcome. In our example, we specifically want to increase safety training participation this year. To be even more specific, we could state by how much we want to increase training participation and which specific time period we want to measure against.

Measurable – There should be a way for you to see if you have achieved the goal and there should be a way to measure it. If the goal is to accomplish one thing, it is easy to measure—either you did, or you didn't. For other goals you need a metric. In our example, we need to know our past training participation numbers so we can see if we had more of them in the period we want to measure.

Achievable – Whatever goal we set should be realistic. We should be able to achieve it. In our example, we can increase the amount of training completions by implementing specific actions targeted at participation.

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Relevant – This part ensures you align your goal by focusing on what matters at your organization. Employee health and safety are important at every business, but not just because of cost. Employees are essential to success; protecting them by providing relevant training is good for the entire enterprise and will likely result in other benefits like increased retention, improved morale, and better productivity.
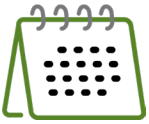
Time bound – Setting a deadline provides a target date for your goal. It could be a timeframe, such as this year, or it could be a set date like by January 1. In our example, we want to increase safety training participation this year. We can see if we achieved the goal by comparing the number of employees who completed safety trainings this year to last year.

Follow up

You can write the best goals in the world, but if you aren't checking on them regularly it's like they were never written. How often you should check on your goals depends on your organization; some like to check in every month, some do it once a year. Whatever timeframe you select, you should be consistent by setting aside time to review your progress. Ideally, the meeting will include representatives from each business area that is directly involved with the goal. That way, you can get a complete picture.

These check-in meetings help to motivate work teams to achieve goals, they help your organization focus on what's important and they allow you to take lessons from unaccomplished goals. It also allows you to celebrate victories. Employees appreciate being recognized for their hard work, especially when they can see how their efforts contributed to overall organizational success.

Another important consideration is how to share your progress with the rest of the organization. Consider posting a report and other tracking materials in a public space so others can share in the progress toward the goal.

To sum it up

All businesses should set goals so they can align their business activities with their overall vision. Goals help motivate employees and provide a way to measure success while focusing on what really matters. This handout can help any organization get started.

Goal setting 101

- Create a goal setting team from all over the organization
- Involve employees in the goal setting process
- Draft goals that align with organizational mission and vision
- Ensure goals are SMART
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Timebound
- Publicize goals throughout the organization
- Set a regular schedule for checking in
- Consider posting progress to goals in a public space
- Celebrate victories
- Learn from unrealized goals

Activity ideas

- Practice writing a SMART goal for your organization. How does it connect to your organizational vision and purpose?

- In a group, write a SMART goal for your organization, then create a list of objectives for achieving it. Is your organization equipped to meet those objectives? What resources do you need?

- Set a schedule for meetings to create goals and check on their progress.