Setting S.M.A.R.T. goals & objectives
QUICK REFERENCE GUIDE FOR EMPLOYEES

Setting individual goals or objectives is a fundamental ingredient for performance management and development. They are essential for establishing role clarity and alignment on the performance outcomes that need to be achieved – clarity for you as an Employee and for your Manager. A key principle that underpins the approach of setting goals/ objectives in the South Australian Public Sector is that Managers and Employees need to work in partnership with one another to agree these expectations.

What are S.M.A.R.T. goals & objectives?

The S.M.A.R.T. model is an established approach based on research into effective goal-setting which has been shown to help motivate and guide people towards enhanced performance. You can use this to help sharpen and clarify the goals and objectives that you agree with your Manager for each performance cycle.

Specific – make sure outcome of the goal or objective is described using specific and concise statements that say what needs to be done. Usually specific statements answer the five "W" questions:

- What – what do you want to accomplish
- Why – specific reasons, purpose or benefits of you accomplishing the objectives
- Who – who is involved
- Where – identify a location
- Which – identify requirements and constraints

Measurable – you will need to select appropriate measures that will help you know when the expectation has been met, measures that you can monitor and report on along the way, which demonstrate that the goal or objective has been accomplished. Define a measurable outcome rather than just inputs and processes. Measures can be expressed as:

- Quantity – i.e. how many, or what volume
- Quality – i.e. how well
- Milestones – i.e. particular markers achieved on time
- Cost – i.e. within budget

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Achievable – the goal or objective needs to be an achievable expectation based on the individual circumstances, capability time and resources available to the employee. In judging whether it is achievable you may need to consider operational factors such as your "business-as-usual" workload, external demands from stakeholders, and availability of input and support from others. Other inputs that may help you establish how achievable the outcome is could include:

- Your previous experience of working on similar goals/ objectives or direct observations of others who have
- Examples of other achievements that you have had made in the past
- Baseline measures or benchmarking that has been established over time

Relevant – the goal or objective needs to be relevant to the context of the organisation and relevant for you as a person. Ideally this provide a clear line of sight and linkages between:

- corporate goals or objectives,
- your team's goals or objectives (and your Manager's individual goals or objectives),
- the scope of your job as outlined in your role description
- matched to your personal strengths and experience, and
- in line with your development and career plans where possible.

Time referenced – the goal or objective needs to have a clear deadline or timeframe for delivery. This is normally expressed by a date, time period or frequency for completion. Being able to link this back to existing reporting cycles and mechanisms can be helpful, such as project meetings, monthly reporting, other key events in your organisation's annual calendar. It is good practice to specify progress reviews and check-points along the way to help you "manage upwards" along the way rather than just at the end.

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KEY BENEFITS OF SETTING S.M.A.R.T. GOALS & OBJECTIVES

- Provides focus, helping you avoid becoming distracted by other activities and increasing your likelihood of achieving the right outcomes
- Makes it easier to track your performance along the way, with clear indicators of progress
- Clarifies performance expectations and priorities so you understand what outcomes need to be achieved and how you need to approach these
- Allows you to see the connection between your individual contribution and the broader aims of the organisation

When to set or review goals & objectives

While there are some key points of the annual performance cycle, such as formal performance management and development reviews, where you need to take stock of goals and objectives, they are a tool which can be used at any time to help track progress or re-focus your efforts. Some typical situations where you might do this include:

- When you are appointed to your role, within the first 90 days of joining the agency or starting a new position
- At the beginning of your organisation's annual planning cycle, so that priorities flow from the strategic/ business plan, through to operational plans, and then your individual priorities
- In response to changes being implemented which impact on priorities of your team and your individual areas of focus
- In response to changes in your personal situation that you may share with your Manager through regular conversations, where this is appropriate

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Agreeing goals & objectives

Employees and Managers need to work together in establishing individual goals or objectives so they meet organisational priorities. To build joint commitment to these, it is better for both parties to have input into drafting them so there is context from the Manager and individual ownership from you. You both need to be comfortable and confident that the goals or objectives are appropriate and can be delivered. Investing time into clarifying this with each other up-front helps to build mutual understanding of performance expectations.

What about when things change?

Change is happening all the time and you can't necessarily plan for everything. You will need to be flexible in recognising the implications of change on performance goals/objectives for your role and revisit them when necessary. There may be some goals/ objectives that are no longer relevant, and some new ones which need to be captured and tracked through to completion. It is good practice in performance management and development to keep goals or objectives "live", assessing them regularly, and adapting them as they are achieved or as priorities in the organisation change. This is important in order to make the organisation agile in response to the changing environment it operates in, and also in recognition of how individual circumstances for employees can also change.

Example S.M.A.R.T objectives

POORLY DEFINED OBJECTIVES

S.M.A.R.T. OBJECTIVES

Answer phone calls promptly

Answer all in-bound phone calls to the office within an average of 50 seconds as measured by the call management system and client satisfaction reports, by 30th of June next year, in a professional manner as outlined in the customer service standards.

Contribute to the continuous improvement of the team's output

Participate in identifying opportunities for continuous improvement by identifying at least one area where reduction in re-work will result by 28 February next year as measured by quality standard reporting.

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POORLY DEFINED OBJECTIVES

S.M.A.R.T. OBJECTIVES

> Provide efficient customer service

Until next February, complete an average of 80 customer transactions per day, with no errors at 4 minutes average handling time, in line with the Customer Service Principles.

> Deliver policy project

By 30 September, scope the new policy project using the departmental project management tools and prepare a presentation for the stakeholder group outlining the key benefits and resource requirements.

KEY POINTS

- Investing time into setting S.M.A.R.T. goals and objectives helps to clarify performance expectations and provide focus throughout the performance year
- You will need inputs both from broader organisation plans and from you as an individual in order establish appropriate goals and objectives
- It is important that Managers and Employees work in partnership together to set goals and objectives so they are genuinely agreed and there is mutual commitment to achieving them
- There are some key points in the annual performance cycle to set and review goals and objectives, but they can be assessed and adapted at any time to reflect changes that occur