

Action plan



Develop your goal setting and planning routine

Goals galvanise employees. Effective goal setting, and the planning that underpins achieving those objectives, ensures the work they're doing has the best possible impact. Business leaders are the fulcrum of that process, so investing time in your routine makes a difference.

- **Effort:** Low
- **Impact:** High

Actions:

Pick three company goals and write down the process you used to create and monitor them in a bullet point list.

- **Impact:** Low
- **Suggested duration:** 3 days
- **Why this will help:** Defining your process gives you a starting point to make improvements. You can update the list during this exercise and when you work through your monthly goal setting and planning routine in the future.

Make sure the goals meet the standard set by the SMART methodology – they are Specific, Measurable, Achievable, Realistic, and Time-bound – and update them if necessary.

- **Impact:** High
- **Suggested duration:** 3 days
- **Why this will help:** Building the SMART methodology into your routine improves the quality of the goal setting process and gives staff the best chance of having an impact.

Check the impact the goals will make on long-term objectives and whether they fit your company's vision.

- **Impact:** Medium
- **Suggested duration:** 21 days
- **Why this will help:** Comparing your monthly goals to long-term plans makes sure you're heading in the right direction and helps you and the team see what impact they will have.

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Work with the team to convert the data that's identified through setting the goals and reporting on progress into insight and action.

- **Impact:** Medium
- **Suggested duration:** 21 days
- **Why this will help:** It's not just about setting goals for your team, you need to make sure they have the opportunity to explain why targets were missed or hit – and you have the chance to make changes.

Update your goal setting and planning process, and block time in your diary to carry it out every month.

- **Impact:** High
- **Suggested duration:** 30 days (ongoing)
- **Why this will help:** Recording what you learnt through this exercise makes sure you can continue to use the new approach and make improvements. Blocking out time to complete the different tasks makes sure the routine sticks.

How will I know if my action plan is working?

Way to measure success

Completed planning sessions.

Why this metric?

If you've properly embedded your monthly goal setting and planning routine, there will be a series of months where you've completed the process.

How do I start tracking?

Check your forecasts and goal reporting.