



5 Sure-Fire Ways to

# SET GOALS THAT GET RESULTS





## About Quantum Workplace

Quantum Workplace provides an all-in-one employee engagement software that makes managers the central drivers of workplace culture. Serving more than 8,700 organizations, Quantum Workplace's technology gives team leaders direct access to employee feedback and personalized real-time insights, so they can make work better every day. The software includes surveys, goals, recognition, feedback, one-on-one, and alert features — providing a powerful solution for team engagement and continuous improvement.

As the survey partner for America's Best Places to Work, Quantum Workplace has helped honor and create top workplaces for more than 15 years. For more information, visit [quantumworkplace.com](http://quantumworkplace.com).

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## About BambooHR

BambooHR is the No. 1 HR software for small & medium businesses. Our beautifully designed interface gives HR professionals time for more meaningful work through powerful tools and intuitive features.

To see why thousands of customers in over 100 countries love BambooHR, visit [bamboohr.com](http://bamboohr.com) or follow us on Twitter at @BambooHR.

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# ABOUT THE RESEARCH

We polled more than 1,000 employees on their organization's views and processes surrounding employee goals. We've collected the qualitative data, calculated the quantitative results, and combined it with our industry knowledge to publish this report: 5 Sure-Fire Ways to Set Goals that Get Results.

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# WHY ARE GOALS IMPORTANT?

We work with more than 8,000 organizations and more than half a million employees, our experience tells us that the most successful people and organizations set goals to reach success. Goals help people and organizations achieve more, faster, with less. Goals can be a powerful tool in your organization, too; here are some of the most impressive benefits of employee goal setting:



## Shared Alignment

Goals unite employees, managers, and leaders around a common purpose. When employees understand the organization's goals, they can align their team and personal goals to company goals, which increases the likelihood of achieving those company-wide targets.



## Clear Direction

Goals provide guidance to employees, guiding the decision-making process of how to spend their time, which projects to complete, and the amount of effort to give their work. Goals encourage employees to take action and place effort toward goal-related activities and spend less time focusing on activities unrelated to their goals.



## Performance Motivation

Goals motivate, inspire, and fuel higher performance. They energize employees and drive tenacity. When faced with meeting a goal, employees become resourceful, using or seeking out existing knowledge or acquiring new knowledge needed to succeed.



## Effective Evaluation

Goals help measure success. All good organizations are trying to improve, grow, and become more profitable. Goals provide a clear destination and a clear manner to evaluate company success by comparing actual performance to desired performance.



## Thoughtful Planning

Goals prompt employees to plan. When employees have a goal to achieve, they are more likely to create and execute a plan to meet that goal.

In the end, all these benefits lead to one outcome: better employee performance. But not all goals are created equal! Research has shown that the following five practices are the most important keys to setting goals that get results.

# 5 SURE-FIRE WAYS TO SET GOALS THAT GET RESULTS



# 1

## SET GOALS WITH THE END IN MIND.

The best goals are set with a clear vision of where you want to go. In fact, that's the most basic definition of a goal: the intent to get somewhere. Goals without an end result don't even really count as goals. While everyone agrees that objective is a crucial part of goal-setting, not all organizations do it well. In fact, only 60 percent of employees thought goals were set effectively in their organization.

### 3 Keys to Setting Goals with a Powerful Objective

#### 1. Like where you're going.

Ask yourself – what is the result of this goal? The visionary result of a sales goal isn't more sales; the result might be a big dollar commission check, and the results of those results might be a brand new convertible. Do you want the results of this goal? If not, you've set the wrong goal.

#### 2. List the steps.

Goals aren't accomplished with single acts; they are accomplished with tons of little acts, over a long period of time. Don't set a goal without having a rough idea of the steps it takes to get there.

#### 3. Push beyond normal.

Goals shouldn't be used simply to mark progress; you have a to-do list for that. Goals should push you slightly beyond comfortable, out of your ordinary. Make sure your destination isn't someplace you'd get to in the normal course of your current work.

Here are the two most popular methods for setting goals with a powerful objective!

[SMART Goals Template](#)

[OKR Template](#)



# 2

# INCLUDE EMPLOYEES IN GOAL SETTING.

If you want a goal to get done, you better have everyone on board. And the best way to get employees invested and on board is to include them from the beginning. How would you like to be held accountable for a result that you feel is either unachievable, unimportant, or unclear? Involving employees in their own goal setting increases alignment and feasibility, involves employees in the outcome, and holds them more accountable for results.

Very few managers, however, are taking this idea to heart. Less than 40 percent of employees are very involved in the setting of their own goals. Even more shocking, about 18 percent of employees are only minimally or not involved at all. Giving employees ownership promotes buy-in and accountability. Strong team leaders don't dictate; they rely on their people and work together to determine what goals to set and how high to aim.

## Why is employee involvement in goal setting essential for goal achievement?

*"When employees are involved in the goal setting process, it's more likely that the goal will be achieved. Employee involvement creates ownership and clarity, both of which are essential to driving progress.*

*When employees are included in the goal setting process, they have input on and agree to aspects of the goal including goal structure, metrics, and milestones. This creates a heightened level of ownership, which in turn creates a higher likelihood of achievement.*

*Now, clarity: without employee involvement, clarity of expectations crumbles (and performance isn't far behind). When managers and direct reports are both on the same page as to what needs to get done, there's less room for wasted effort or misaligned expectations."*



QUANTUM WORKPLACE  
INSIGHT:

**Anthony Edwards**  
Customer Success Director



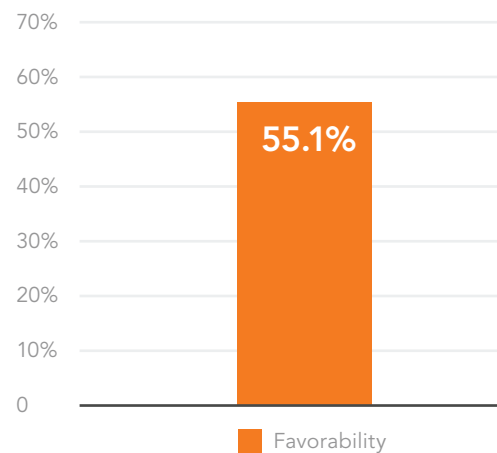
# 3

## TRACK GOALS CONSISTENTLY AND INTENTIONALLY.

Just over 50 percent of employees believe goals are tracked effectively in their organization – not a good sign. Organizations can't improve what they don't measure; without effective tracking, goals are worthless.

There are two key components to effective goal tracking: consistency and intentionality. Goals must be tracked regularly so those involved can have an accurate idea of progress (or lack thereof). Goals also must be tracked intentionally. Manager must explain and show that tracking is not just a box to check, but that this information is valuable to share with the rest of the team and organization.

Goals Tracked Effectively





## 6 Things Every Goal Tracking System Must Do

Whether your organization is stuck using stone-age tools like Excel spreadsheets, or they've moved to something that can better support their needs like a goals software, the same six things must be present in every goal tracking system. Read on to find out more.

### 1. Align with your organization's goal philosophy.

The system you use must match your desired state for setting and tracking goals. Who sets goals? How do you define a well-phrased goal? How do you measure success? How do you communicate about goals? How often do you look at progress?

### 2. Provide transparency, clarity, and alignment.

Trusting leadership and understanding how individual roles align with company objectives are key drivers to engagement. Use a goal setting system in your organization to provide employees with transparency and clarity about goals and accountability, as well as an understanding of how their personal and team goals align to organizational goals.

### 3. Empower managers and teams.

Managers and teams are the lifeblood of your organizations — and thus, your goal setting system needs to be built for their easy use. Look for features like automated goal summary emails, progress alerts, and goal observation permissions if your organization decides to use a goals software.

### 4. Support both private and public goals.

Even if your organization believes in total transparency of goals, make sure your system accounts for private goals. Why? To support personal development. Your goal setting system should be used not only as a tool for key company objectives, but also to encourage and manage employees' personal growth.

### 5. Meet tracking needs of different types of goals.

Different goals require different methods of tracking; metrics can include dollar, whole number, percentage, and binary results. Look for a goal setting system that will support the various tracking methods your different roles and teams will require.

### 6. Connect goals to coaching and recognition.

An effective goal setting system will integrate well with other organization processes, like employee performance. Goals most directly tie to employee recognition and employee coaching.



# 4

# MAKE GOALS VISIBLE TO EVERYONE AT THE ORGANIZATION.

Over the years, goals have effectively become private agreements between managers and employees, kept contained within unique teams or departments. In fact, more than 40 percent of employees say they have no visibility into other teams' goals. With this set-up, no one outside the traditional hierarchy has the ability to see progress throughout the organization. This practice, typically referred to as goal cascading, creates a hyper competitive culture of "ME."

Instead, organizations should aim for goal setting and tracking that allows for goals to be highly visible throughout the organization. This transparent structure allows every employee to push one another to meet a common goal.

## Why is visibility and transparency essential for goal achievement?

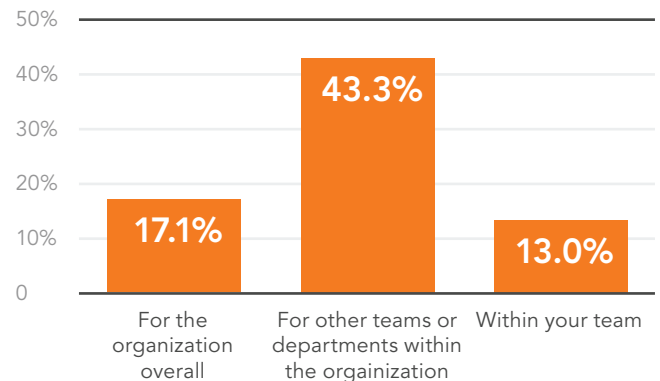


**Brian Anderson**  
HR Insight Specialist



*"While it's important to set goals, it's even more important to remember them. When you know that someone else will ask about your goals, whether it's your manager, a coworker, or just a friend, then not only will they remind you to do your part, but they can understand how your goals can support their efforts as well."*

### I have no visibility to the following goals





# 5

## REVIEW AND REVISE GOALS.

Though often overlooked, goal setting and tracking doesn't end with the deadline. One of the most important steps is looking back, but right around 50 percent of employees feel goals are reviewed or revised ineffectively. Reflection on previous goals – what worked well and what didn't – provides opportunities for transparency, constructive criticism, and ultimately, better performance. Review and revision conversations should happen in a timely manner, within two weeks of the goal deadline. Include everyone who was involved in the goal, not just leaders, to gain the most insights on improvement.

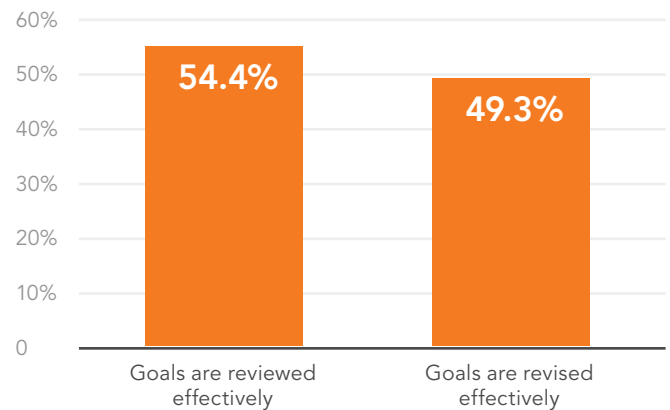
Why is the review and revision process essential for goal achievement?



**Tawni Reed**  
HR Generalist & Payroll Admin



*"Life is full of unexpected twists and turns that can prevent us from meeting even our smallest goals. To combat those changes, it is important that we keep our goals relevant by revising and reviewing them regularly. Reviews and revisions help us keep our goals specific, measurable, attainable, realistic and timely—and those are the types of goals that lead to positive change."*





## 10 Questions for Reviewing and Revising Goals

### Reviewing:

1. What goals were set last month, quarter, or year?  
What were the results?
2. Are we happy with those results? Why or why not?
3. Did we set the right goals?  
Were the goals we set accurate expectations?
4. What caused the results we got? How much control did we have over those results?
5. Did we track our goal progress in a way that promoted transparency and accountability?

### Revising:

6. What should we change about our upcoming goals? Why?
7. What should we keep the same about our upcoming goals? Why?
8. How can we ensure better results than last time?
9. Are there different metrics we can track that are more representative of performance?
10. Are there additional people who need to be included on these goals?

# BUT THAT'S NOT ALL

Employee goals are essential to your organization's engagement, but it's only one part of a much larger effort to engage employees.

**Does your organization have the tools it needs to drive engagement and get results?**

The logo for bambooHR, featuring a green bamboo leaf icon to the left of the text "bambooHR" in a green, lowercase, sans-serif font, with a small "TM" trademark symbol to the right.

[LEARN MORE](#)

The logo for Quantum Workplace, featuring an orange circular icon with a white dot inside, positioned above the text "QUANTUM" in a blue, uppercase, sans-serif font, with "WORKPLACE" in a smaller, blue, uppercase, sans-serif font below it.

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