RESOURCE FOR SUPERVISORS AND DIRECT REPORTS

Sample Goals for:

Any Position

Common Functions

General Management Responsibilities

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.**

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Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.**

PERFORMANCE GOALS FOR ANY POSITION

READINESS FOR WORK

Goals in this section can be used with almost any employee. Generally, these kinds of goals are not regularly included in the goal-setting process unless some specific issue has arisen that warrants special attention. For example, most employees don't require an explicit goal to encourage them to arrive at work on time, but employees with a history of arriving late might benefit from setting such a goal.

Punctuality

- Arrive at work on time 98% of the time
- Arrive at meetings on time so as not to inconvenience other participants
- Return from breaks on time 98% of the time
- Notify your supervisor at least one hour before scheduled arrival if you anticipate arriving late
- Clock in and out in accordance with company procedures 100% of the time
- Begin working within five minutes of arriving at work
- Arrive on time for meetings with customers 98% of time

Attendance and Absenteeism

- Limit less serious health-related absences to seven days per year
- Use sick days only for health reasons or for other reasons approved by supervisor in advance
- Provide documentation, as required in company policy, for any absences greater than three consecutive work days
- Arrange in advance with supervisor for any absences not related to health (e.g., child care)
- Notify supervisor of emergency absences as soon as possible

Health

- Take care of health and stress issues to reduce impact on productivity
- Ensure that there are zero instances of arriving at work under the influence of alcohol or drugs
- Maintain sufficient physical conditioning to carry out work responsibilities
- Notify manager if on-the-job injuries may impact productivity
- Cooperate with manager and/or employee assistance programs to rearrange job responsibilities as required by health issues
- Attend regular alcohol counseling sessions as agreed upon
- Participate in the drug-testing program as agreed upon
- Avoid any conduct that might result in infecting others
- Attend employee assistance meetings as agreed upon with manager

See also: Self-Management and Work Habits

CONFLICT MANAGEMENT AND TEAM CONTRIBUTIONS

Goals in this section can be used with any employee; they focus on desirable methods of dealing with conflict and how the employee can contribute to better team functioning.

Contributions to Team Health

- Ensure that all participants in group discussions can express themselves without being embarrassed, bullied, or belittled by other participants
- Play facilitating role in team meetings to encourage other team members to participate
- Ensure that credit is given to others who contribute to team well-being
- Role-model desirable team behavior to the satisfaction of the manager
- Balance task and process so work gets done and positive team climate is maintained
- Advocate the "celebration" of different talents of team members and capitalize on those talents to make the team more effective
- Move between leadership role and team member role on various projects, as required
- Establish solid rapport with each team member, as indicated by team members
- Refrain from gossip or other discussions about fellow team members behind their backs
- Redirect group conversation away from gossip

Contributions to Team Productivity

- Generate at least two ideas per year that help the team improve productivity
- Initiate group discussion for process improvement
- Learn and teach the use of control charts to team members
- Encourage others on the team to identify barriers to team functioning and to suggest remedies
- Perform team-assigned work on time and to standards
- Coordinate own responsibilities with those of other team members so no project is delayed due to lack of team coordination

Handling Customer Conflicts

- Use active listening techniques when customer complaints are directed your way
- Address problems with customers so manager need not be involved 95% of the time
- Resolve every customer conflict within 24 hours of the initial conflicted interaction and to the customer's satisfaction
- Handle customer conflicts in calm, unemotional, and helpful way, to the satisfaction of the manager
- Refer a customer to the manager in cases where the conflict is not resolvable at your level
- Ensure that the customer recognizes that the employee is trying to resolve the problem
- Eliminate customer complaints regarding lack of effort to resolve disagreements

Handling Internal Conflicts

- Address peers privately when critiquing work at hand
- Handle provocation in ways that de-escalate conflict situations
- Deal with differences of opinion in open and respectful ways
- Ensure that there are zero incidences of losing temper and lashing out at colleagues
- Accept criticism from peers without becoming defensive
- Refrain from lobbying other staff members for support in conflicts
- Receive no valid complaints about conduct during the year from peers

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 9

- Accept help from manager to resolve conflicts, according to manager
- Refrain from public efforts to humiliate or embarrass colleagues who disagree

See also: Communications, Communication, Customer Service and Support

Self-Management and Work Habits

Goals in this section can be used with almost any employee. Generally, these kinds of goals are not regularly included in the goal-setting process unless some specific issue has arisen that warrants special attention. For example, most employees don't require an explicit goal to encourage them to behave scrupulously and honestly, but employees with a history of behaving negligently and with little regard for the truth might benefit from setting such a goal.

Appearance and Clothing

- Maintain well-groomed, neat appearance, to the satisfaction of your supervisor
- Follow corporate dress code at all times
- Arrive at work with required safety clothing and equipment in good condition
- Ensure zero validated complaints about appearance from customers
- Modify clothing worn to reflect the particular work tasks of the day

Ethical/Personal Conduct

- Behave scrupulously and honestly in all activities
- Do what's right regardless of personal consequences
- Demonstrate integrity and honesty while interacting with customers, coworkers, and managers
- Report any personal conflicts of interest to manager before others identify them
- Follow all guidelines regarding ethical and proper use of company equipment, including internet access
- Provide visible leadership to colleagues regarding the importance of ethical conduct
- Seek out guidance from others regarding appropriate conduct when ethical conflicts occur
- Know and follow all applicable laws
- Receive zero validated complaints from customers regarding dishonesty

Organization and Use of Time

- Keep personal work space tidy and well organized
- Spend five minutes or less a day on personal phone calls
- Develop a plan to complete work before requesting time away from work
- Schedule vacation time by negotiating with supervisor to mutual satisfaction
- Adhere to company policy regarding eating and drinking at desk
- Replace any shared equipment or resources as soon as possible
- Ensure that others can find things you have organized or moved
- Ensure that no more than one minute per call is spent finding a customer information file
- Balance work-space functionality and neatness
- Manage multiple projects at the same time with no delays resulting from disorganization
- Meet project milestones at least 90% of time

- Maintain project time sheets as agreed upon with supervisor
- Maintain billable hours according to company standards

Willingness to Help/Volunteer

- Volunteer 75% of the time to "buddy up" with new team members
- Volunteer 50% of the time to take team meeting minutes and publish them
- Volunteer 50% of the time to organize after-hours social outings
- When daily work quota is met, volunteer 100% of the time to help others meet their daily quota
- Take responsibility for at least one United Way charity activity every three years.

See also: Readiness for work, Work Outputs and Productivity, Conflict Management and Team Contributions.

Work Outputs and Productivity

Goals in this section can be used with any employees; they pertain to maintaining and improving productivity for the individual employee, for colleagues, and for the work unit.

Own Work

- Develop and implement at least one cost-saving idea applicable to your own work each year
- Redesign the file system to reduce file retrieval time by 10%
- Increase your processing speed by at least 10% by <<DATE>>
- Seek out advice from supervisor for ways to improve work quality and quantity
- Complete all major assigned projects on time and within budget
- Accept responsibility for quantity and quality of work without blaming others for problems
- Balance the demands of multiple projects so no project falls behind schedule
- Ensure that outputs are free of defects by the time they reach the customer
- Produce outputs that meet agreed-upon standards 98% of time

Contributing to Work of Others

- Ensure that your actions do not interfere with coworkers or reduce their productivity
- Help at least one coworker each month improve his or her productivity
- Inform coworkers if you become aware of issues that may affect their productivity
- Ensure that resources used (e.g., books, tools, manuals, supplies) are returned to their proper place so others can use them
- Refrain from interrupting the work of others for social reasons
- Respond to requests for information from coworkers within one day of request
- Inform support staff when unavailable for phone calls so they can inform callers of the approximate callback time
- Refrain from avoiding work and passing it off to coworkers
- Encourage coworkers and recognize their contributions
- Provide feedback and suggestions to peers without being intrusive or overbearing
- Coach others in developing sensible goals

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 11

- Document and communicate about shared work so others have information they need to be productive

Contributing to Overall Productivity

- Contribute via the suggestion system at least one useable idea for improving productivity every six months
- Generate at least one cost-cutting idea that is implemented and does not reduce productivity
- Modify individual work to reflect changes in current work-unit priorities
- Prioritize your own work according to work-unit priorities
- Volunteer for tasks outside of job responsibilities to help the work unit achieve its goals
- Lead the improvement team in reducing errors by 12% this year
- Play a lead role in helping others understand the basics of statistical process control
- Assist in diagnosis of root causes of productivity problems

See also: Self-Management and Work Habits, Conflict Management and Team Contributions, Productivity/Process Improvement/Organizational Results.

Personal and Skill Development

Goals in this section can be used with any employee; they relate to the employee improving his or her ability to contribute to the organization through acquiring skills, whether to remedy weak areas as revealed through performance appraisals or to grow in areas that would increase chances of promotion.

Assessment

- Identify the two most important specific skill gaps that might impede work performance
- Determine at least one means (formal and/or informal) to close each of the skill gaps identified
- Identify and communicate career goals to manager and develop a career development plan, to be updated each year
- Choose one area of new skills to acquire that will expand your current abilities to prepare you for other responsibilities and then specify the outcomes you expect
- Target one aspect of personal development and specify criteria by which coworkers will assess your growth in that area

Formal Learning

- Research training options to identify the most cost-effective training methods for each of the areas identified for development
- Attend at least one work-related training seminar per year
- Attend evening or weekend classes as agreed upon with supervisor and as identified as important for promotion
- Earn at least a B grade in all company-sponsored college courses
- Attend one annual professional conference in your field and prepare a report for others in the company
- Satisfy all conditions required to maintain licensing in your field

- Report on any formal training attended, within one week of completion, and make recommendations
- Abide by any agreements made with the company regarding return of service for training
- Receive zero validated complaints about conduct in seminars and training attended

Informal Learning

- Seek out coaching from more experienced staff members to build your skills
- Share new skills with coworkers doing similar jobs
- Request help from the manager before your productivity is negatively affected by insufficient knowledge
- Communicate that you are willing to receive feedback from supervisors and coworkers
- Ask others for suggestions about how to do something more efficiently
- Take the initiative for learning by researching and reading independently and then submitting a written summary to the manager by the end of each month, listing the main research sources used and the articles and books read and outlining what you learned from each
- Demonstrate initiative when unable to accomplish a task, by consulting manuals before calling for help
- Show interest in professional development by using personal time for development activities when appropriate
- Ensure zero instances of problems resulting from not reading product instructions

See also: Work Outputs and Productivity

Communication

Goals in this section can be used with any employee; they relate to the processes of written and oral communication within the organization and with outside entities.

Interpersonal/Team

- Communicate with respect with others in the organization, regardless of their status
- Accept feedback from others without becoming defensive
- Provide feedback to others that conforms to general feedback rules regarding tone and timing
- Reduce the need for others to require clarification resulting from unclear communication
- Eliminate work errors resulting from being unclear in communicating
- Speak persuasively, using facts and figures, not emotion, to support position
- Refrain from communication that conveys that others are inferior
- Draft internal documents free of typographical and spelling errors
- Refrain from telling jokes based on sex, race, religion, physical characteristics, or profanity
- Contribute to team communication in meetings by brining discussions back to the topic when they digress

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 13

Management

- Communicate so that the manager can respond to questions from executives
- Inform management of problems before they affect productivity
- Report any anticipated variances from schedules to management at least one month in advance
- Listen to improvement suggestions offered by manager and act upon them
- Respond to management requests for information within 24 hours
- Document customer concerns and forward to management promptly
- Draft required reports for management on time and with no need for revisions

Customers

- Inform customers of unavoidable delays
- Explain to the customer's satisfaction why his or her needs cannot be met
- Project an image of patience and expertise to customers
- Refrain from using pressure or coercion when communicating with customers
- Follow up all oral agreements with written summaries to the customer within four days of oral agreement
- Communicate with customers in plain language, to the satisfaction of the customers, as indicated by feedback
- Ensure that the customer understands what you are saying so that he or she and you are on the same page at the conclusion of the meeting
- Interpret the language of contracts into plain language so the customer understands, so there are no contractual disputes involving employee communication
- Notify customers of any changes to schedules that affect them, to avoid unnecessary inconvenience

Media Relations

- Direct all media inquiries to the appropriate media relations person, as designated
- Refrain from any public comment on issues beyond the scope of your communication authority
- Respond to media requests for information in appropriated fashion within one day
- Project a positive corporate image even when provoked by media
- Draft clear, understandable press releases that require no further clarification of the facts
- Appear on local television shows to discuss the company at least once every three months
- Respect confidentiality in all dealings with the media
- Communicate a calm demeanor when under pressure

See also: Communications, Customer Service and Support.

Performance Goals for Common Functions

CUSTOMER SERVICE AND SUPPORT – MANAGEMENT GOALS

Goals in this section can be used with anyone who manages or supervises staff having customer service and support responsibilities.

Customer Communication/Satisfaction

- Conduct monthly customer focus groups that yield at least one customer service improvement tactic each
- Develop and implement customer feedback system by year-end
- Ensure that customer inquiries and complaints are responded to within one working day
- Ensure that customer complaints are resolved within five working days

Customer Service Improvements

- Reduce department complaint level to 3% of transactions
- Develop strategy to use employee suggestion boxes to improve customer service

Customer Service Management

- Ensure that all employees can explain various merits of products to customers
- Train all staff in operation of cash register so each employee can cover in emergencies
- Orient new floor staff within two days of hiring
- Schedule shifts so there are no fewer than three floor workers available at any time
- Contact 10 customers a week to follow up on customer service perceptions
- Monitor 10% of incoming calls to call center
- Provide feedback to each employee on his or her customer-handling process at least once a month
- Ensure that service calls scheduling results in no more than an average delay of 10 minutes in arriving
- Ensure that all staff members understand and apply proper phone etiquette
- Reduce time that customers spend on hold by 10%
- Reduce merchandise returns from present level storewide
- Ensure that all staff can correctly apply returns and refunds policy 100% of the time
- Accurately plan customer service loads to reduce overtime to less than 2% of total hours worked
- Implement a system of employee recognition (for superior or customer service) that majority of employees endorse

Customer Service Quality

- Maintain at least 95% of items as “in stock” for any given month
- Reduce checkout wait time to an average of five minutes

See also: Communication, Retailing/Merchandising-Management, Sales and Business Development-Management

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 15

Customer Service and Support

Goals in this section can be used with any employee who has direct contact with customers (both internal and external), who is involved in enhancing customer experience, or who supervises or manages employees who have direct customer contact.

Customer Communication

- Conduct monthly customer focus groups that yield at least one customer service improvement tactic each
- Develop and implement customer feedback system by year-end
- Notify customers of changes in service call timing 100% of time
- Design and write clear and understandable product manuals, as measured by customer feedback
- Inform other employees in contact with customer of previous conversations with that customer and the history of the situation
- Ensure that no customer needs to repeat his or her information during ordering/support call
- Contact each customer at least 30 days before expiration of contract to negotiate renewal
- Contact product purchasers within 30 days of purchase to discuss service agreement options

Customer Satisfaction/Retention

- Maintain rating of at least 3 in customer surveys
- Maintain a minimum of 90% customer complaints validated by manager per year
- Receive no more than three customer requests per year to assign different staff member
- Receive no more than three order cancellations per year resulting from customer service complaints
- Ensure that 90% of customers choose to renew their contracts
- Identify reasons why customers are not renewing and report this information to customer service manager each month

Customer Service Improvements

- Contribute at least two customer service improvement strategies per year
- Evaluate and report on competitors' customer service procedures
- Reduce department complaint level to 3% of transactions
- Develop strategy to use employee suggestion boxes to improve customer service

Customer Service Management

- Ensure that all employees can explain various merits of products to customers
- Train all staff members to operate cash register so they can cover in emergencies
- Orient new floor staff within two days of hiring
- Schedule shifts so there are no fewer than three floor workers available at any time
- Contact 10 customers a week to follow up on customer service perceptions
- Monitor 10% of incoming calls to call center

- Provide feedback to each employee on his or her customer-handling process at least once a month
- Ensure that service call scheduling results in no more than an average delay of 10 minutes in arriving
- Ensure that all staff members understand and apply proper phone etiquette
- Reduce time that customers spend on hold by 10%
- Reduce merchandise returns from present level storewide
- Accurately plan customer service loads to reduce overtime to less than 2% of total hours worked
- Implement a system of employee recognition (for supervisor customer service) that majority of employees endorse

Customer Service Quality

- Maintain at least 95% of items as "in stock" for any given month
- Reduce checkout wait time to an average of five minutes
- Price items so every item on shelf has price sticker/UPC
- Fulfill all orders the same day as received
- Process refunds without invention/help of supervisor
- Route phone calls to proper person 98% of the time
- Solve customer problems in single phone call 90% of the time
- Identify and report to superior any slowdowns in providing customer service
- Provide at least two possible options for purchase to each customer
- Fulfill promises to customers 100% of time or notify them of changes
- Provide job quotes that are no more than 10% off final price
- Answer all calls professionally, using proper phone etiquette
- Handle customer complaints without supervisor intervention 90% of time
- Maintain abandoned call levels to 4% of total calls
- Do not interfere with overall customer service team performance as measured by comments from other team members
- Provide advice to customers that works the first time in 95% of contacts

See also: Communication, Retailing/Merchandising, Sales, and Business Development

Information Technology: Hardware and Operations – Management

Goals in this section can be used with anyone involved in managing personnel with responsibilities for the selection, purchase, deployment, maintenance, and/or security of computer hardware, networks, and related job functions.

Project/Staff Management

- Ensure that 90% of projects are completed on time and require no rework
- Ensure that all emergency calls are responded to within 20 minutes
- Schedule operations staff to ensure 24-hour coverage in person or via pagers

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 17

- Coordinate hardware and software teams to reduce unnecessary wait time for project implementation
- Ensure that all hardware purchases delivered to customer are effective as indicated by minimum 85% of clients
- Ensure that computer resources are available for all high-priority corporate initiatives
- Identify key operational goals of other work units in conjunction with disaster recovery planning
- Negotiate computer operations chargeback rates with other department managers that are seen as fair by managers
- Ensure that reports have skills and knowledge required to complete planned projects
- Create schedules that anticipate staff absences and assign backup roles to staff on high-priority projects

Purchasing and Maintenance

- Authorize purchases according to corporate priorities for current year
- Prepare hardware procurement budgets that are approved without modification by the CFO
- Ensure that total cost of purchased equipment for the year is within budget
- Negotiate supplier contracts to balance cost versus quality of equipment
- Review and approve cost estimates for capital expenditures prepared by direct reports
- Contact each division manager at least once every two months to determine levels of satisfaction with supplied resources and to project/identify future needs
- Ensure that other divisions use key suppliers to take advantage of negotiated discounts/cost savings

Results Management

- Reduce reliance on paper files within total organization by creating document management system by <<DATE>>
- Ensure that zero purchases are necessary that result from inadequate equipment maintenance
- Reduce operations staff overtime by 15% this year
- Improve job processing throughput by 10% without incurring additional costs
- Ensure that 85% of users are satisfied that interactive response time is adequate
- Prepare annual report for senior executives outlining major activities and costs and benefits of each of those activities
- Eliminate data losses resulting from computer viruses
- Consult with managers to reduce computer theft by 50% this year

See also: Information Technology: Software-Management, Information Technology: Hardware and Operations

Information Technology Hardware and Operations

Goals in this section can be used with anyone involved in the selection, purchase, deployment, maintenance, and security of computer hardware, networks, and related job functions.

Backups/Disaster Recovery

- Run daily backups as set out in backup schedule (no missed backups)
- Coordinate disaster recovery team dry runs at least twice a year
- Ensure that disaster recovery process can be completed within two days of event with no loss of data
- Inspect off-site disaster recover center at least once a month to ensure operability
- Ensure that all disaster recovery personnel are clear about their roles and functions in the event of a disaster
- Deposit completed backups in company safe each day by 6 p.m.
- Send backup media to off-site backup center each day and verify receipt by 9 p.m.
- Maintain disaster recovery plan and communicate to all personnel who need to know
- Ensure that recovery plan reflects corporate and business priorities
- Ensure that security/recovery procedures do not negatively impact business functions

Customer Support

- Acknowledge requests for hardware repairs/maintenance within one hour of receipt
- Inform customers of planned computer outages at least one working day prior to outage
- Provide basic training to customers on accessing and using computer network
- Set up accounts for users within three hours of receiving request
- Notify job/process owners when jobs are going to be delayed more than one hour
- Collect information from computer users at least once a year on possible enhancements to the network

Data and Hardware Security

- Monitor networks and report any attempts at unauthorized system access to security within 24 hours of attempt
- Develop and implement corporate strategy for reducing junk e-mail by 50% by December 2004
- Reduce incidence of virus infection on corporate computers to no more than one per year
- Advise users on safe computing practices to prevent virus infections
- Ensure that all systems passwords for all users are at least nine alphanumeric characters
- Develop and communicate procedures to ensure that each computer can be accessed by computer owner only
- Secure network servers so only authorized personnel have physical access
- Carry out security audits without disrupting regular business processes according to department managers
- Reduce theft of computer equipment within company to less than $1,000 per year
- With human resources develop policy on acceptable use of computer resources by December 2004

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 19

- Complete monthly computer/internet access audits to identify any possible violations of acceptable use policy

Maintenance and Operations

- Ensure that unplanned network downtime is limited to no more than once every two months
- Schedule all planned downtime to occur after regular work day
- Maintain existing desktop PCs so no employee is without computer access for more than one working day
- Notify systems staff within one hour of failure of scheduled computer runs
- Prioritize requests for computer maintenance to reflect relative business-case priorities
- Reduce job reruns due to operator error to no more than one per week
- Monitor and maintain computing environment so zero shutdowns are required per month due to temperature or other environmental issues
- Participate in and advise energy management group on possible strategies to reduce computer-related energy requirements
- Maintain network cables and wiring so there is no more than one network problem per two months attributable to cabling
- Report computer usage statistics to each departmental manager within 10 days of end of each month
- Reduce user complaints about delays or slowdowns on network to no more than one per month
- Monitor and report on corporate use of Internet and recommend best strategies to maintain effective high-speed access for users

New Equipment

- Help managers prepare for purchase of new hardware a cost-benefit analysis that proves to be accurate within 10% of actual results
- Prioritize requests for new equipment to reflect relative business-case priorities
- Ensure that new equipment works properly when made available to users
- Review cost-benefit analyses, make recommendations, and submit to the CFO so it takes no more than one month to complete new equipment request review
- Anticipate needs for new equipment and budget for it so no business process is negatively impacted by outdated or nonworking equipment
- Prepare and submit budget for new equipment acquisitions to division manager no later than September 30 of each year
- Explain reasons why request for new equipment has been postponed or denied, to satisfaction of requesting manager
- Ensure that all equipment purchased is compatible with existing software and hardware 100% of the time
- Ensure that all new hardware is operational within seven days of receipt or in accordance with agreed-upon schedule

See also: Information Technology: Software, Information Technology: Hardware and Operations-Management

Information Technology: Software Management

Goals in this section can be used with anyone involved in leading, managing, or supervising individual staff or teams involved in developing, programming, testing, and deploying software systems and solutions.

Communication/Training

- Select and groom an individual to perform the supervisory role so that supervisor's absence is "seamless"
- Provide training for new data entry clerks based on individual learning style so that each new clerk is fully functional within one month of hire
- Coach and mentor junior analysts so that more subject matter experts are available for work assignments
- Ensure that line managers understand sign-off procedures so no changes need to be made to specs after sign-off date
- Ensure that complete documentation for all software projects is available to clients
- Advise line managers so software solutions increase productivity by a minimum of 10%
- Coordinate training of end users so all staff are trained and productive within two weeks after system goes online

Productivity

- Develop strategy to improve the data entry process so that overtime is eliminated
- Coordinate work with other IT managers so no delays result from lack of communication
- Chair analyst/programmer meetings so that all agenda items are completed each meeting
- Reduce average system development life cycle by a minimum of 10%
- Advise the CFO on relative merits of outsourcing vs. in-house development, to the satisfaction of the CFO
- Coordinate project personnel to eliminate duplicate effort
- Reduce rework by 20%
- Create data quality standards that reflect client needs by June 20
- Make sure that systems do what they are expected to do according to clients

Project Management

- Assign data entry special assignments to appropriate personnel so that the data is entered accurately and within the specified time
- Maintain the expected 80-20 supervisor ratio by using 20% of the week performing data entry tasks and 80% of the week performing supervisory tasks
- Inform data entry clerks of possible changes to completion times of assignments so that they can manage their work and home life accordingly
- Schedule and manage on-call staff so emergency pages are answered within 20 minutes
- Prioritize incoming line manager requests according to overall company priorities
- Ensure that 90% all software development projects are completed no more than two weeks late
- Ensure that all new systems developed are ISO 9000 compliant

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 21

See also: Information Technology: Hardware and Operations- Management, Information Technology: Software

Information Technology: Software

Goals in this section can be used with anyone involved in developing, programming, testing, and deploying software systems and solutions and anyone involved with data entry.

Data Entry

- Input data with a speed of 8,000-plus keystrokes per hour
- Input data with an accuracy rate of 98% or better
- Edit input prior to data entry so that data is accepted into system with a 95% success rate
- Recognize and resolve data issues within 24 hours of discovery
- Proofread coworkers' inputted data and identify all errors
- Work overtime at least two hours per week
- Inform supervisor of possible changes to completion times of assignments so that client expectations and department work schedules can be managed accordingly

Business Systems Analysis

- Identify and solve problems using department standard problem-solving process before problems can affect the clients
- Identify alternative solutions to a business problem or opportunity, then recommend a solution, to allow client to select the best solution
- Communicate with all groups of people equally well, knowing when to provide management summary information and when to provide detailed information, so that each group has the information required to make its business decisions
- Document business and systems requirements appropriately for each group of people so that the programmer can code the solution and the clients can understand what is being delivered and an appropriate test strategy can be applied
- Design and deliver presentations to clients with one week's notice or less and to the satisfaction of the clients
- Train end users so that they can use new software within an acceptable time, as defined by the end users
- Work productively with all team members within each phase of the system development life cycle so that the system or solution is delivered accurately and on time
- Review vendor software to determine its fit for use within the system

Programming

- Use department standard coding techniques so that code delivered is easily maintained and upgraded as required
- Identify alternative coding solutions and recommend a solution to more junior programmers to allow them to acquire systems and business knowledge

- Document coding and systems solutions appropriately so that solutions to future problems or upgrades can be implemented easily and in a timely manner
- Apply knowledge of clients' needs and priorities so systems changes or upgrades can be proactive rather than reactive, decreasing time to market
- Provide feedback on team programmers' coding solutions, suggest better coding when appropriate
- Document coding changes within each program so as to keep a good and updated history of program changes, reducing the time to market when program changes or upgrades are required
- Design technical tools for department use that reduces the time required to perform the "business as usual" tasks by 10%
- Review vendor software to determine its fit for use within the system
- Deliver program code to production at least 98% bug free
- Create 100 lines of program code per day
- Provide programming effort estimates within 10% of actuals to facilitate the scheduling of project tasks

Testing

- Identify major system components to facilitate the estimation of time required to test system upgrade or single change
- Analyze software defects to detect patterns that help discern system problems so that system solutions can be implemented in a timely manner
- Apply the various test types appropriate to each phase of the system development life cycle
- Input appropriate test data with which to test the system with fewer than five entry errors
- Test system with sufficient detail so that the system does not have any major problems when it is implemented
- Attend to detail so that each system defect is recorded and retested until it is resolved
- Categorize each system defect so that "showstoppers" are addressed before minor problems
- Document results so that testing progress can be determined in regard to timelines, number of defects found, number of defects resolved, number of defects retested, etc.

System Deployment

- Contact most appropriate personnel for problem resolution during implementation
- Analyze implementation problems to detect patterns that help discern solutions so that system can be implemented on time
- Understand and apply the company's best practices regarding implementation strategies
- Recognize and point out potential problems when developers develop their implementation plan
- Schedule the company's various system changes and upgrades

System Support (Help Desk)

- Respond to each client within 15 minutes of receiving a description of the problem
- Resolve the problem within 24 hours of client's initial contact

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 23

- Provide department- or company-wide messages providing details of a current problem when required
- Communicate courteously to clients who are experiencing problems, to the satisfaction of the clients
- Escalate the problem as required but only when necessary
- Provide resolution instructions to each client in writing, via voice mail, or over the phone, according to the clients' preference
- Follow up with client 48 hours after resolving the problem
- Document a history of each problem logged and forward to supervisor each week

See also: Information Technology: Hardware and Operations, Information Technology: Software-Management

Financial

Goals in this section can be used with anyone involved in financial management and processing financial information (e.g., accounts receivable clerks), executives and managers, and anyone directly involved in financial functions (e.g., accountants, auditors). Because financial functions are often distributed throughout different levels of the organization, goals in this section may fit those with management responsibilities and those without.

Bottom-Line Results

- Increase shareholder dividends by 1%
- Increase stock market value by $10 million
- Increase market share by 10% over next three years
- Increase ratio of profit to sales by 10%
- Reduce uncollectible debt by 20%
- Maintain current AAA credit rating
- Identify five cost-saving initiatives by midyear and implement at least two by year-end
- Maintain return on equity at a minimum of 10% a year

Budgeting

- Complete or oversee preparation of final yearly budget on time and with no revisions required
- Ensure that submitted budget conforms to required format and conditions
- Analyze and approve yearly budgets of subordinate work units four weeks prior to year-end
- Reduce operating budget by 10% for next fiscal year
- Present budget and obtain approval from the board of directors
- Develop tax-reduction strategy resulting in 8% tax savings
- Analyze costs and benefits of outsourcing and report them to the CFO, to her satisfaction
- Budget funds in accordance with program priorities provided by the board of directors
- Create unit budget that includes 10% cut in operating funds
- Submit budget that requires no more than one modification cycle
- Provide summary of budget options that includes effects of those options on overall revenue
- Prepare budgetary predictions for next five years for use in strategic budgeting
- Identify how corporate allocation for employee development is to be spent

- Identify and prioritize expenditures as required, recommended, and discretionary

Conformance to Financial Practices

- Ensure that accounting practices conform to industry standards
- Ensure that financial reports pass auditors' inspection without major challenges
- Ensure that financial decisions meet legal and ethical requirements
- Provide documents to auditors within one week of request

Spending and Financial Practices

- Implement cost-saving programs to yield 10% cost reduction without reducing output
- Reduce ratio of cost-to-collect to collected amount to 12:100
- Reduce non-personnel operating costs by 6% while maintaining revenue
- Develop and implement innovative cost cutting programs for work unit
- Contribute to cost-control teams by developing company-wide cost-control strategies
- Limit ratio of operating costs to sales to 10%
- Partnering with auditors, identify possible unnecessary expenditures
- Partnering with corporate managers, identify areas of redundant or overlapping responsibilities and unnecessary spending
- With other division managers, identify possible cost savings by using outsourcing and prepare recommendation
- With other division managers, identify functions that may be grouped together (centralized) to yield cost savings
- Implement and evaluate cost-control strategies mandated by company and present monthly reports to project head
- Develop and implement a plan to identify cost overruns before they occur
- Reduce total project cost overruns to a maximum of 4% of budgeted value
- Manage employee suggestion system to increase total saving from suggestions to 5% of operational budget or $75,000
- Reduce overtime payments to no more than 4% of total labor/salary costs
- Reduce total overtime hours by 25%
- Stabilize profit levels to limit layoffs to 2% of total workforce per year

Processing

- Accurately process and generate a minimum of 100 invoices per week with no more than a 1% error rate
- Run payroll reports weekly, to be completed by 10 p.m. each Friday
- Cut accounts payable checks within time limit established by vendors
- Cut checks in a timely fashion so no interest is accrued on accounts
- Respond to questions from payroll and accounts payable within two working days
- Process and validate expense claims within 30 days of submission
- Identify any problems that slow down processing, inform superior, and offer possible solutions

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 25

- Ensure that all reports to government are delivered on time such that no penalties are incurred
- Conduct credit checks to reduce defaults to no more than .5% of total billed
- Write contracts to limit contract disputes to 1% of total contracts written
- Ensure that 90% of accounts are reconciled by the end of the following month
- Administer petty cash according to corporate spending guidelines
- Provide accurate payroll data to IT five days prior to each check run

Reporting and Communicating

- Prepare and submit monthly financial summaries to the satisfaction of the CFO
- Inform superiors of anticipated revenue shortfalls and surpluses at least one month before final reporting
- Submit financial reports that are accurate and do not require correction
- Prepare and deliver oral presentations to the board of directors outlining fiscal health, to the satisfaction of the board
- Provide financial projections for five-year period to be used in annual strategic planning sessions
- Provide financial profit/loss projections that differ no more than 15% from actuals
- Respond to employee payroll inquiries so no more than 5% need to be addressed by supervisor
- Report anticipated cost overruns to executive for approval
- Provide monthly profit/loss projections for future quarters accurate within 10%
- Improve financial reporting procedures by working with internal auditor
- Deliver year-end reports on time and in proper format

Revenue Enhancement

- Identify two new revenue streams to come online within two years
- Increase net revenue by 10%
- Increase gross revenue by 10%
- Double percent of total revenue contributed by [product or service]

Other

- Reduce foreign exchange risk exposure to 5% of total equity
- Provide financial advice to the satisfaction of the CFO
- Negotiate with external suppliers to reduce costs and error rates
- Implement supplier education program to help suppliers reduce their own costs
- Implement new streamlined bid system to allow easier, more competitive bidding
- Develop and implement plan to make the company's bids on projects more competitive

See also: Sales and Business Development, Customer Service and Support-Management

Creative Communication

Goals in this section can be used with employees involved in creating written and graphic material in all forms-advertising copy, corporate image graphics, brochures, newsletters, and Web sites.

Copywriting

- Produce copy satisfactory to the client within one revision cycle
- Write ad copy that highlights key product selling points as specified by marketing
- Produce three publishable articles per month
- Create copy with no more than one factual error needing correction
- Meet copy deadlines as specified by the director
- Produce copy that meets space guidelines as specified by word count
- Ensure that all material used complies with copyright laws; obtain permission when necessary
- Modify writing style to suit client needs as indicated by client satisfaction ratings

Copyediting/Layout

- Ensure that final copy is completely free of errors
- Provide feedback to writers on style and quality of copy
- Meet all deadlines for submitting final copy to production
- Ensure that all copy contains strong lead and graphic elements
- Work with graphics department to ensure that copy and graphics reinforce message
- Ensure that final copy reflects desired corporate image
- Lay out documents so they are attractive and easy to read

Graphic Design

- Design graphic images that are memorable and reinforce the company brand
- Create final graphic images in camera-ready form for production
- Present graphic designs to client or executive for discussion at least one month prior to final deadline
- Produce graphics that reinforce the message of the text they are to accompany
- Help the client define the messages to be conveyed by the graphics, to the satisfaction of the client
- Create a final product that reflects creative standards and the needs and preferences of client/owner
- Design conference displays that sales people perceive as useful in increasing sales
- Maintain an inventory of graphic materials, supplies, and equipment as required for assigned projects
- Translate thoughts, ideas, and images into pictures and designs to the satisfaction of the client

Web Site Design

- Document Web site code so others can understand and work on code
- Create a Web site that portrays the company consistent with corporate image policy
- Ensure that the Web site can be updated quickly and efficiently
- Make the Web site visually more appealing, according to feedback surveys of Web site visitors

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 27

- Keep content of the Web site fresh and up to date
- Consult with department heads so their sections of the Web site contain accurate information
- Ensure that costs for Web site hosting remain under $6,000 per year
- Prepare the annual budget for Web site production and maintenance accurate within 10%
- Obtain all necessary copyrights and permissions so that all Web site content is legal
- Meet Web site sales quotas each year
- Create an intranet site that is easy to navigate, so 80% of employees accessing it indicate they can find what they need quickly
- Coordinate Web site contributors so Web site is completed on time

See also: Communications, Communication

Human Resources and Personnel- Management GOALS

Goals in this section can be used with anyone working in human resource departments who has supervisory or managerial responsibilities.

Compensation/Benefits

- Ensure that salary and benefits packages are competitive to attract top-quality candidates, according to unit managers
- Ensure that compensation levels are within 10% of industry norms
- Keep project salary costs for next year within 5% of estimates
- Research and suggest options for new profit-sharing program
- Ensure that no more than 5% of job offers are rejected due to inadequate salary and benefits
- Maintain overall overtime levels at less than 4% of total payroll per month
- Contribute to corporate team investigating health insurance options and write the final report for executive management
- Identify best practices in providing day car and recommend to the board of directors a course of action that takes into account practicality and financial issues

Conformance

- Ensure that hiring practices conform to Equal Employment Opportunity Commission requirements
- Reduce substantiated discrimination complaints to zero
- Inform the CEO of potential illegal practices that put the company at risk
- Procure expert legal advice on behalf of the company as needed
- Complete human resources audit once every two years to determine conformance levels
- Identify any illegal nonconformance to HR laws before external agencies do

Hiring

- Ensure that job applications are representative of the diversity of the local workforce
- Develop strategies to increase qualified applications from members of minority groups by 10% next year
- Keep recruitment costs within 10% of industry average
- Fill all jobs within six weeks of initial job posting

- Reduce the time needed to fill vacancies by 10% from previous year

Labor Relations

- Reduce union labor actions to zero, while staying within financial guidelines
- Reduce total grievances to 15 or fewer a year
- Reduce total grievance proceedings losses to three per year
- Reduce by 20% the time needed to come to labor agreements
- Report bargaining deadlocks to the CFO within three hours of occurrence

Policy Development/Communication

- Prepare estimates of required staffing levels for next five years, to the satisfaction of the CFO
- Research and report on potential outsourcing of HR functions, to the satisfaction of the CFO
- Respond to request from senior executives for advice or information within one working day
- Develop a downsizing strategy that does not result in significant loss in productivity

Staff Development

- With senior executives, prepare an annual staff development plan linked to the organization's strategic plan
- Ensure that staff development planning is linked to work-unit performance management process
- Develop a staff development plan that reflects the organization's skill needs for the upcoming year and incorporates input from executive, line managers, and employees
- Keep current and knowledgeable about current HR trends and laws by attending annual government briefings on HR law and attending one national HR conference per year
- Reduce staff development costs while increasing staff development hours delivered, by coordinating needs and solutions across the company and using economy of scale

Staff Retention/Promotion

- Ensure that at least 95% of promoted employees succeed, as reflected in yearly performance reviews
- Maintain staff turnover ratio between 5% and 8% per year
- Reduce new hire turnover to less than 10%
- Reduce dismissals related to substance abuse to less than 3% of total dismissals
- Reduce staff loss resulting from "insufficient challenge in job" by 10%

Staff Satisfaction

- Chair employee satisfaction committee that suggests at least five strategies for improving company morale that get implemented
- Achieve company objective of being listed as one of the top 100 companies to work for
- Advise senior executives on low-cost morale building strategies

See also: Managing Performance, Personnel/Hiring/Retention

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 29

Human Resources and Personnel

Goals in this section can be used with employees in human resource departments or elsewhere involved in hiring and retention, including work-unit managers.

Hiring

- Screen job applicants so hiring managers are satisfied with the pool of applicants
- Develop and implement an online job application system by year-end
- Ensure that job applications are representative of the diversity of the local workforce
- Develop strategies to increase qualified applications from members of minority groups by 10% next year
- Keep recruitment costs within 10% of industry average
- Fill all jobs within six weeks of initial job posting
- Reduce the time needed to fill vacancies by 10% from previous year
- Ensure that managers understand steps to follow to request additional staffing so they can do so with no errors or requests for clarification

Staff Development

- With senior executives, prepare an annual staff development plan linked to the organization's strategic plan
- Incorporate staff development planning in work-unit performance management process
- Help employees find the most effective means of maintaining professional certification
- Advise employees on recommended development activities that will increase their potential for promotion
- Ensure that employees are knowledgeable about all product lines
- Provide basic orientation for new employees that they rate as "above average" in surveys
- Help managers provide specific job orientations with new hires to reduce time required to get new employees up to speed
- Use acting status appointments to develop at least four promising managerial candidates per year
- Maintain a database of training options for specific positions that at least 30% of employees consult in any given year
- Develop a staff development plan that reflects the organization's skill needs for the upcoming year and incorporates input from executive, line managers and employees
- Advise on organizational development issues and refer to managers to competent resources, to the satisfaction of the managers
- Keep current and knowledgeable about current HR trends and laws by attending annual government briefings on HR law and attending on national HR conference per year
- Maintain database of local trainers, including quality review information, so managers can arrange seminars without the intervention of HR
- Reduce staff development costs while increasing staff development hours delivered by coordinating needs and solutions across the company and using economy of scale
- Ensure that staff development planning is linked to the work-unit performance management process

Staff Retention/Promotion

- Ensure that at least 95% of promoted employees succeed, as reflected in yearly performance reviews
- Maintain staff turnover ratio between 5% and 8% per year
- Reduce new hire turnover to less than 10%
- Reduce dismissals related to substance abuse to less than 3% of total dismissals
- Reduce staff loss resulting from "insufficient challenge in job" by 10%
- Conduct exit interviews for every employee and provide the HR manager a semiannual report on reasons for leaving

Staff Satisfaction

- Conduct staff satisfaction surveys at least once every two years
- Prepare recommendations to improve employee satisfaction, with at least two recommendations implemented each year
- Use exit interview data to raise employee satisfaction levels
- Chair employee satisfaction committee that suggests at least five strategies for improving company morale that get implemented
- Achieve company objective of being listed as one of the top 100 companies to work for

Conformance

- Ensure that hiring practices conform to Equal Employment Opportunity Commission requirements
- Reduce substantiated discrimination complaints to zero
- Advise the managers on legal interviewing techniques
- Prepare and advise the managers for grievance hearing
- Inform the CEO of potential illegal practices that put the company at risk
- Procure expert legal advice on behalf of the company as needed
- Complete human resources audit once every two years to determine conformance levels
- Identify any illegal nonconformance to HR laws before external agencies do

Policy Development/Communication

- Create a staff development policy that links staff development expenditures to the organization's needs
- Communicate information about benefits package options in plain English, so most employees understand them
- Consult with line managers on policy changes that affect them prior to rewriting policies
- Write policies that managers can follow without asking additional questions
- Prepare estimates of required staffing levels for next five years, to the satisfaction of the CFO
- Research and report on potential outsourcing of HR functions, to the satisfaction of the CFO
- Develop and communicate performance management policy to managers so that managers indicate they understand and can implement the policy

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 31

Work-Unit Support

- Maintain job descriptions and update descriptions each year or as required by managers
- Support managers in undertaking performance management so that managers complete 80% of appraisals on time
- Provide employee assistance referrals to the satisfaction of managers and employees
- Administer human resources database to maintain 98% uptime
- Provide support to managers in handling layoff situations humanely
- Develop a downsizing strategy that does not result in significant loss in productivity
- Ensure that employees and managers complete forms provided by HR so that no more than 2% need revision
- Respond to managers' requests for assistance within one working day
- Help managers determine optimal staffing levels for work unit to maintain or increase effectiveness
- Provide training to managers on conducting termination meetings safely and to the satisfaction of the managers as indicated in feedback sheets
- Provide at least three different forms from which managers can choose to track performance management
- Provide legal interpretations to managers regarding personnel issues within two days of request and with at least 98% accuracy
- Provide managers and employees with information about substance abuse rehabilitation resources available and increase the use of such resources to within 30% of the incidence of addiction in the population

Compensation/Benefits

- Ensure that salary and benefits packages are competitive to attract top-quality candidates, according to unit managers
- Ensure that compensation levels are within 10% of industry norms
- Keep project salary costs for next year within 5% of estimates
- Research and suggest options for new profit-sharing program
- Ensure that no more than 5% of job offers are rejected due to inadequate salary and benefits
- Maintain overall overtime levels at less than 4% of total payroll per month
- Contribute to corporate team investigating health insurance options and write the final report for executive management
- Identify best practices in providing day care and recommend to the board of directors a course of action that takes into account practicality and financial issues

Labor Relations

- Reduce union labor actions to zero, while staying within financial guidelines
- Reduce total grievances to 15 or fewer a year
- Reduce total grievance proceedings losses to three per year
- Reduce by 20% the time needed to come to labor agreements
- Complete labor agreements for bargaining group by July 6 and stay within financial guidelines established by the CEO
- Report bargaining deadlocks to the CFO within three hours of occurrence

Other

- Provide clear guidance to systems personnel about HR requirements for personnel tracking system
- Review and recommend possible options for HR management software to satisfaction of the CFO
- Lead systems development initiative to develop an integrated HR management system to be completed by year-end
- Ensure employees receive all tax documentation at least three weeks prior to government set mandatory date
- Attend local Human Resources Association meetings and present on at least one topic each year
- Make employee assistance referrals quickly enough to maximize outcomes

See also: Managing Performance, Personnel/Hiring/Retention

Physical Plant Maintenance – Management

Goals in this section can be used with management and supervisory staff involved in supervising maintenance, repair, and cleaning activities related to the physical space and equipment in the workplace.

Cleaning

- Ensure that department managers make no more than one complaint per month about cleaning service
- Contract with outside cleaning agencies to provide required cleaning services within allocated cleaning budget
- Schedule cleaning staff to minimize overtime and ensure that all required cleaning is done on time
- Do spot checks of premises at least once a day to ensure cleanliness
- Review cleaning logs to make sure washrooms are cleaned on schedule
- Review customer feedback forms and alter cleaning schedules to increase “cleanliness” rating by 20%
- Maintain cleaning supplies inventory to ensure zero need for employees to make special purchases due to shortages
- Ensure that all volatile cleaning materials are kept secure, with access restricted to cleaning staff
- Work with cleaning staff to research and recommend better cleaning products

Plant Maintenance

- Ensure that plant downtime related to emergency repairs totals no more than three hours per month
- Develop maintenance schedules for major equipment that result in a 10% reduction of total downtime due to equipment failures

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 33

- Prioritize requests for maintenance, according to the potential impact on safety and productivity
- Ensure that overall response time for requests for maintenance is within company requirements and specifications
- Meet regularly with supervisors and line managers to identify ways the maintenance unit can provide better service to them
- Ensure that unplanned emergency purchases constitute no more than 10% of the physical plant maintenance budget each year
- Arrange for normal elevator maintenance to occur outside of peak work hours
- Help the VP Operations identify major equipment replacements that will be necessary within next two years
- Solicit from equipment users at least one maintenance improvement strategy to reduce unplanned failures
- Review problem-reporting procedures and improve as necessary

Safety

- Chair workplace safety and health committee during <<YEAR>>
- Ensure that all maintenance employees understand and follow emergency procedures
- Arrange for immediate emergency repair of critical emergency systems within one hour of being notified
- Assign and train staff in roles in emergency shutdown and evacuation situations
- Coordinate third-party inspections of critical physical plant machinery (boilers, elevators) to comply with government certification requirements
- Develop and implement a maintenance strategy to reduce customer injuries requiring medical attention to zero in the upcoming year
- Review and stay current on government workplace safety and health regulations
- Ensure that maintenance employees report and remedy violations of government guidelines before they are identified by outside inspectors

See also: Workplace Health and Safety-Management

Physical Plant Maintenance

Goals in this section can be used with employees involved in any maintenance, repair, and cleaning activities related to the physical space and equipment in the workplace.

Cleaning

- Inspect washrooms at least once an hour and identify cleaning needs
- Ensure that customers rate “cleanliness of establishment” as at least very good
- Complete cleaning logs with no errors

- Complete end-of-shift cleanup so employees on the following shift do not complain about tasks not completed
- Use appropriate cleaning solutions and products for job, according to supervisor
- Inform supervisor of upcoming shortages of cleaning supplies so no shortage interferes with maintenance
- Respond to requests for aisle cleanup within 10 minutes and complete the cleanup within 20 minutes
- Ensure that doorways into facility are clear of ice and snow or other impediments to customers
- Place cleaning equipment so as to not block entryways for more than five minutes at a time during cleaning
- Clean windows in public view to maintain clear, unobstructed vision and clean appearance
- Maintain cleaning equipment inventory so all items are easily accessible and access to the items is not blocked
- Process empty cleaning materials containers in prescribed and safe way

Plant Maintenance

- Respond to emergency physical plant situations within 20 minutes of notification
- Shut down the heating system in emergency situations according to manufacturer's shutdown instructions
- Eliminate your own maintenance errors that affect plant productivity
- Eliminate injuries to employees resulting from your own errors in maintaining assigned equipment
- Inform supervisor of upcoming solutions and products for job, according to supervisor
- Inform supervisor of upcoming shortages of cleaning supplies so no shortage interferes with maintenance
- Respond to requests for aisle cleanup within 10 minutes and complete the cleanup within 20 minutes
- Ensure that doorways into facility are clear of ice and snow or other impediments to customers
- Place cleaning equipment so as to not block entryways for more than five minutes at a time during cleaning
- Clean windows in public view to maintain clear, unobstructed vision and clean appearance
- Maintain cleaning equipment inventory so all items are easily accessible and access to the items is not blocked
- Process empty cleaning materials containers in prescribed and safe way

Plant Maintenance

- Respond to emergency physical plant situations within 20 minutes of notification
- Shut down the heating system in emergency situations according to manufacturer's shutdown instructions
- Eliminate your own maintenance errors that affect plant productivity

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 35

- Eliminate injuries to employees resulting from your own errors in maintaining assigned equipment
- Inform supervisor of the progress of every repair so he or she can communicate effectively with plant supervisors as needed
- Carry out preventative maintenance for assigned machines and as set out in manufacturers' guidelines
- Identify probable causes of potential failure of major equipment and notify manager for preventative repair and replacement
- Maintain maintenance and repair logs for all major physical plant machinery
- Develop and maintain positive relationships with outside repair and maintenance personnel

Safety

- Respond to emergency physical plant situations within 20 minutes of notification
- Shut down the heating system in emergency situations according to manufacturer's shutdown instructions
- Eliminate your own maintenance errors that affect plant productivity
- Eliminate injuries to employees resulting from your own errors in maintaining assigned equipment
- Inform supervisor of the progress of every repair so he or she can communicate effectively with plant supervisors as needed
- Carry out preventative maintenance for assigned machines and as set out in manufacturers' guidelines
- Identify probable causes of potential failure of major equipment and notify manager for preventive repair and replacement
- Maintain maintenance and repair logs for all major physical plant machinery
- Develop and maintain positive relationships with outside repair and maintenance personnel

Safety

- Notify management and HAZMAT team of any potential hazardous substance spills within 10 minutes of identifying them
- Spot and remove any items out of place that may constitute safety hazards
- Place warning signs when cleaning floors so there are zero customer accidents related to improper signage
- Eliminate all occurrences of spillage of hazardous material as a result of your own handling errors
- Participate and contribute to workplace safety and health committee
- Participate in monthly checks and inspections of all safety equipment including fire alarms, smoke detectors, and carbon monoxide detectors

See also: Workplace Health and Safety

Support-Management

Goals in this section can be used with anyone who manages or supervises support staff employees or who has members of support staff as direct reports.

Communication, Supervision, and Training

- Explain work task requirements to reports, in order to reduce error rates to 1%
- Create and provide job aids for staff
- Ensure that staff employees work within authority levels on all tasks
- Conduct training on new technology systems
- Monitor 3% of incoming calls to provide feedback to employees
- Advise staff on methods to improve productivity
- Interpret policy and advise staff on policy interpretations
- Develop and maintain accurate job descriptions for supervised positions
- Train new hires in operation of office machines within three days of hire

Office Management

- Identify alternate sources for office supplies, to reduce costs by 10%
- Increase throughput by 10% without additional staff
- Respond to complaints from users about support functions within one working day
- Reduce days lost due to injuries from ergonomic problems by 8%
- Draft cost-benefit reports for technological improvements under consideration
- Negotiate office equipment maintenance contracts to hold costs stable for YEAR

Scheduling and Work Assignments

- Ensure adequate job coverage of staff absences
- Schedule staff to reduce overtime to 5% of total hours worked
- Assign work to staff to make best use of time and skills
- Accommodate the special needs of staff without sacrificing productivity

See also: Support, Customer Service and Support-Management

Support

Goals in this section can be used with employees carrying out various support functions-filing, reception, switchboard, and handling phone calls.

Clerical/Filing

- Ensure that there are no more than 10 case files at one time in the “to file” basket
- Log shared files taken by staff so that others needing the files can locate them
- Review the filing system once each year to determine efficiency of system
- Retrieve files within five minutes of file request
- Ensure that other employees can retrieve files on their own without the help of a clerk
- Check forms submitted for errors so that no more than 2% of the forms filed contain errors
- Process forms within three days of receipt
- Maintain file security and access control so that zero unauthorized accesses occur

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.**

- Ensure that no more than 1% of files are lost or otherwise unavailable
- Take outgoing mail to mailroom by 4 p.m. each day

Reception

- Inform all visitors of the approximate wait time, accurate within 10 minutes
- Greet all visitors within three minutes of arrival
- Provide staff with enough information about the needs of visitors so they can reduce meeting time
- Receive no more than one complaint per month about the service provided to visitors
- Keep reception area clean and orderly
- Track the availability of employees, in order to provide accurate information to visitors
- Open the office promptly at 8:00 a.m. 95% of the time

Secretarial

- Produce outgoing documents with no errors in the final draft
- Schedule meetings with no conflicts
- Make travel arrangements to take advantage of advance booking specials
- Schedule so that all outgoing correspondence is dispatched within one day
- Prioritize incoming mail and eliminate all unwanted mail to the satisfaction of the manager
- Edit dictated copy to produce documents that the manager considers better than the text as dictated
- Summarize and submit travel expense vouchers within three days of the trip
- Prepare meeting briefing notes for the manager and have them available at least two hours before each meeting
- Arrange and reserve meeting space and provide refreshments to the satisfaction of the participants
- Order office supplies so that employees always have materials when they need them
- Maintain accurate distribution lists for memos
- Follow up on e-mails sent to ensure they were received and understood
- Screen e-mails to reduce volume to staff by 50%
- Fill requests for duplicating within four hours of request
- Collate and staple documents for professional look, to the satisfaction of the document owner

Switchboard/Phones

- Prioritize phone calls to the satisfaction of the manager
- Take messages with sufficient detail to allow informed callbacks
- Provide sufficient information to callers so return calls can be reduced by 10%
- Route phone calls to the appropriate person 98% of the time
- Process a minimum of 20 calls per hour, as needed
- Answer all calls within three rings
- Ensure that no caller is kept on hold longer than one minute
- Screen calls and provide information to caller, to reduce the need for other employees to call back
- Ensure that phones are covered during breaks, lunch, and short absences

- Speak clearly so that no more than one complaint is received per month about being hard to understand

See also: Customer Service and Support, Financial

Workplace Health and Safety – Management

Goals in this section can be used with managers, supervisors, and team leaders whose reports deal directly with workplace health and safety programs and issues.

Compliance

- Ensure the handling of hazardous material in compliance with federal regulations
- Report hazardous material incidents to appropriate government agency within two days of identifying them
- Ensure that warnings from inspectors are addressed and problems are resolved so that the governing organization takes no further action
- Reduce government inspection warnings to zero for <<YEAR>>
- Eliminate any safety risks that could result in plant shutdowns

Improvement and Investigation

- Work as a liaison with external investigators to the satisfaction of those investigators
- Reduce workplace safety insurance fees by 10% in <<YEAR>>
- Reduce accidents requiring hospitalization by 10% per year
- Reduce minor accidents requiring nurse's station involvement by 15% per year
- Reduce days lost due to accidents to no more than 1% of total days worked
- Reduce at-work fatalities to zero by <<YEAR>>
- Reduce the incidence of occupational disease by 15% by <<YEAR>>
- Develop enhanced systems for collecting accident data, to allow the development of concrete accident-reduction strategies
- Keep and maintain complete, accurate, and timely records of safety violations and incidents

Training and Communication

- Identify at least three sources for safety-related training and recommend the best option to the COO, based on cost and effectiveness
- Ensure that 98% of employees are trained in the handling of hazardous materials
- Ensure that courses receive an average rating of at least 3 out of 5 from participants for the potential of the training to reduce accidents
- Maintain the no-show rate for training at less than 10% per month
- Identify and prioritize corporate training requirements based on frequency and severity of accidents
- Communicate health and safety objectives to all new hires within two weeks of hire
- Create performance standards regarding safety for each employee supervised
- Communicate workplace emergency evacuation procedures to all employees at least once every six months

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 39

- Conduct emergency drills at least once every month, with complete compliance to standards (time needed to evaluate, shut down, etc.)
- Track changes in legislation and ensure that the company is in complete compliance within the time frame established by any new legislation
- Develop and implement employee reward and recognition program for reducing accidents
- Ensure that all employees can recite emergency phone numbers for various types of incidents
- Ensure that job aids and safety posters are available and visible in all high-risk areas

Work Environment

- Develop safe production shutdown procedures so the system can be shut down within five minutes after a safety problem is identified
- Ensure that all subcontractors and service providers understand and abide by company safety procedures
- Ensure that equipment maintenance schedules are followed
- Ensure that the initial response time for treating injured workers is less than 15 minutes for each incident
- Audit physical space arrangements and make recommendations to ensure staff safety in the event of violent incidents
- Invite community law enforcement officials once a year to audit workplace procedures for preventing workplace violence

See also: Security – Management

Workplace Health and Safety

Goals in this section can be used with employees responsible for managing and implementing workplace health and safety programs and issues, work teams with similar responsibilities, and individuals.

Compliance

- Ensure the handling of hazardous material in compliance with federal regulations
- Report hazardous material incidents to appropriate government agency within two days of identifying them
- Maintain your own HAZMAT certification in accordance with government requirements
- Follow all safety-related guidelines for construction site procedures
- Ensure that warnings from inspectors are addressed and problems are resolved so that the governing organization takes no further action
- Reduce government inspection warnings to zero next year
- Eliminate any safety risks that could result in plant shutdowns

Improvement and Investigation

- Work as a liaison with external investigators to the satisfaction of those investigators
- Reduce accidents requiring hospitalization by 10% per year
- Reduce minor accidents requiring nurse's station involvement by 15% per year
- Reduce days lost due to accidents to no more than 1% of total days worked

- Attend and contribute to Workplace Health and Safety Committee meetings, as perceived by other members
- Reduce at-work fatalities to zero by end of _____ [year]
- Reduce the incidence of occupational disease by 15% by _____[year]
- Develop enhanced systems for collecting accident data, to allow the development of concrete accident-reduction strategies
- Keep and maintain complete, accurate, and timely records of safety violations and incidents

Training and Communication

- Deliver safety-related training across company so that 90% of employees achieve a minimum of 80% on final course tests
- Attend and pass defensive driving courses at least once every year
- Identify at least three sources for safety-related training and recommend the best option to the COO, based on cost and effectiveness
- Ensure that 98% of employees are trained in the handling of hazardous materials
- Ensure that courses receive an average rating of at least 3 out of 5 from participants for the potential of the training to reduce accidents
- Maintain the no-show rate for training at less than 10% per month
- Identify and prioritize corporate training requirements based on frequency and severity of accidents
- Communicate health and safety objectives to all new hires within two weeks of hire
- Create performance standards regarding safety for each employee supervised
- Communicate workplace emergency evacuation procedures to all employees at least once every six months
- Conduct emergency drills at least once every month, with complete compliance with standards (time needed to evaluate, shut down, etc.)
- Track changes in legislation and ensure that the company is in complete compliance within the time frame established by any new legislation
- Develop and implement employee reward and recognition program for reducing accidents
- Ensure that all employees can recite emergency phone numbers for various types of incidents
- Ensure that job aids and safety posters are available and visible in all high-risk areas

Work Environment

- Develop safe production shutdown procedures so the system can be shut down within five minutes after a safety problem is identified
- Ensure that all subcontractors and service providers understand and abide by company safety procedures
- Keep all emergency exits repaired and functioning properly at all times
- Conduct weekly inspections to ensure that all safety equipment is in place and operable
- Ensure that the initial response time for treating injured workers is less than 15 minutes for each incident
- Audit physical space arrangements and make recommendations to ensure staff safety in the event of violent incidents

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 41

- Invite community law enforcement officials once a year to audit workplace procedures for preventing workplace violence

Performance Goals for General Management Responsibilities

Managing Performance

Goals in this section can be used with managers and supervisors responsible for performance management and appraisal.

Setting Performance Goals

- Meet with all reports to discuss and negotiate annual performance goals
- Set performance goals with employees in compliance with the company format
- Prepare employees for the goal-setting process to ensure that they can be equal participants
- Inform all employees of major work-unit goals prior to the process of setting individual goals
- Ensure that all reports understand their major job responsibilities, as indicated by favorable survey results
- Set goals that take into account individual strengths and weaknesses
- Modify goals throughout the year in response to changes in work-unit priorities
- Ensure that goals are in place for each employee by (date) of each year
- Ensure that goals are directly linked to unit objectives for the year

Communicating About Performance

- Develop a method for staying informed about progress toward goals and barriers to achieving goals
- Provide monthly feedback to employees about ways to improve performance
- Inform human resources of any possible performance problems that may require their involvement, at least one month before intervention is required
- Identify and implement strategies to remedy performance difficulties
- Identify with each employee any factors interfering with achieving performance goals
- Develop with each employee strategies to remove blocks to achieving goals
- Apply a progressive discipline process as required and in accordance with the organization's policy
- Ensure that every employee receives at least one interim review during the year
- Address performance problems early so they do not escalate into major problems

Observing and Documenting

- Document any significant performance-related discussions
- File a copy of performance goals so it can be found easily
- Send a copy of the final performance appraisal to human resources by the deadline
- Ensure that documentation is sufficiently detailed to explain disciplinary action to a third party

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.**

- Share all documentation with the employee and make sure that the employee signs off on each document
- For each employee, make recommendations about salary increments to human resources two weeks prior to his or her anniversary date
- Ensure that no personnel decisions are overturned due to a lack of documentation or inadequate documentation

Performance Appraisal/Review

- Explain the appraisal process to employees in a way that stresses common benefit
- Make the review useful to employees, as indicated by employee comments and surveys
- Use performance goals as a basis for the performance review
- Identify at least two areas in which employees can improve next year
- Augment written forms as necessary to ensure a complete performance picture
- Give and receive feedback and information about how the employee and the work unit can improve performance
- Ensure that there are no surprises for any employee during the review meeting
- Use performance appraisal information as a basis for planning performance for next period
- Identify at least one action the manager can take to help the employee do his or her job

See also: Leadership and Organizational Climate, Productivity/Process Improvement/Organizational Results

Planning

Goals in this section can be used with managers and supervisors responsible for planning of all kinds- financial, personnel, strategic, projects.

Financial Planning

- Develop a five-year plan every year, projecting income and costs, and present it to the VP Finance each January
- Provide a work-unit budget for each year that is within 10% of actuals
- Plan expenditures to minimize financial risk to company
- Identify and plan for capital expenditures that will return on total investment within two years
- Provide integrated cost and schedule control systems, thereby providing tools to meet the project financial goals
- Develop financial plans that superiors consider useful for making decisions
- Communicate financial plans to staff so they can use them in making decisions
- Forecast financial expenditures for upcoming year, separating out mandatory and discretionary spending

Personnel Planning

- Identify alternatives to hiring new staff to cover increased workload

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 43

- Communicate anticipated personnel needs to human resources three months prior to point at which action is required
- Maintain a stable staff complement that is sustainable (no layoffs) in varying economic conditions
- Assist employees with career-development strategies and use acting status appointments and temporary assignments to other positions to develop employees for increased responsibility
- Identify reasons for high staff turnover in the work unit and develop a plan for reducing it

Strategic and Work-Unit Planning

- Prepare work-unit summary and/or environmental scan for use in the company strategic planning meetings
- With staff, develop work-unit strategic plan that reflect the larger organization's strategic goals
- Attend the company strategic planning meetings with the material needed
- Define clear and achievable work-unit goals that will contribute to company success
- Develop actions plans for achieving each work-unit goal that includes timelines and specifies individual accountabilities
- Revise strategic work-unit plan in the event that major shifts occur in the market, the economy, and/or the environment
- Attend annual conferences so as to be able to predict future trends in the industry

Work Planning/Scheduling

- Assign projects to the most qualified and appropriate employees
- Ensure that all major projects are completed according to planned estimates
- Plan to work to minimize overtime by 5%
- Ensure that all employees have the skills needed to achieve their work goals, as indicated by the employees
- Balance staff workloads so that more projects are completed on time this year than last

See also: Personnel/Hiring/Retention

Personnel/Hiring/Retention

Goals in this section can be used with managers and supervisors who are involved in workforce planning, hiring candidates, and ensuring that the best employees are retained.

Employee Retention

- Ensure that employees who are not performing to standards either improve within three months of notification by their manager or are terminated
- Ensure that key, valuable employees are identified by their managers and retained at a rate of at least 90%
- Research salaries to ensure that offers are attractive enough to retain valuable employees
- Address organizational issues that may contribute to above-average turnover rates
- Ensure that your managerial behavior does not contribute to loss of key employees

- Provide sufficient work challenges for younger, high-potential employees, to rate at least 4 out of 5 for “work challenges” on surveys of employees hired within last three years
- Develop career development plans with high-value employees to improve retention
- Ensure that 85% of new hires are retained past the probationary period
- Maintain employee turnover rate at 10% less than industry average

Forecasting

- Provide workforce need projections to Human Resources by (date)
- Ensure that personnel forecasts are accurate enough that no layoffs will be necessary if the quarterly EBITDA does not drop below 90% of estimates
- Identify skills needed for the upcoming year and ensure that employees have those skills
- Identify alternate strategies (e.g., outsourcing) to meet forecasted personnel needs within personnel budget
- Ensure that no projects are delayed due to lack of staff or lack of staff skill

Interviewing

- Follow the required interview protocol 100% of the time
- Take relevant notes in interviews so decisions can be justified with specifics
- Contribute to creating a professional interview environment in which candidate feel comfortable, as indicated on follow-up surveys
- Use behavioral interviewing techniques as outlined by company procedures
- Refrain from dominating interviews when there are other interviewers
- Provide sufficient opportunity for job candidate to demonstrate knowledge and abilities
- Ensure that zero validated complaints are received regarding illegal interview questions
- Arrive at interviews on time and ready to be an active and effective interviewer
- Prepare for all interviews as evident by asking relevant and useful questions
- Refrain from acting during interviews on any personal biases that are not job-related
- Refrain from canceling or rescheduling interviews except for valid health reasons
- Ensure that contributions and questions are consistent across interviews for any one position
- Assess all candidates using the required point system

Preparing for Hiring

- Update job descriptions at least once a year so they reflect the actual work done
- Work with Human Resources to develop ads that attract highly qualified candidates
- Ensure that all specified job qualifications are legal and do not contravene EEOC regulations
- Develop a general plan for bringing new hires up to speed quickly
- Cooperate with Human Resources to develop strategies to expand the pool of minority applicants
- Create relevant in-basket exercises to be used in interview
- Ensure that all involved Human Resources staff are clear about work-unit needs for every position to be filled
- Assist Human Resources staff in classifying each position accurately to reflect skill and responsibility requirements

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 45

- Collaborate with Human Resources staff to establish for each position a fair salary level that will attract desirable candidates
- Help Human Resources staff set point values for all qualifications for every position to be filled

See also: Human Resources and Personnel-Management, Planning

Leadership and Organizational Climate

Goals in this section can be used with managers, supervisors, and team leaders who are expected to demonstrate leadership within their organizations and contribute to the development and maintenance of a healthy and productive work climate.

Communication

- Align verbal and nonverbal language in a consistent manner
- Balance listening and speaking to demonstrate an interest in others' thoughts and feelings
- Proactively seek out both bad and good news from peers and employees regularly and systematically
- Speak with and listen to at least eight employees each month, to create person-to-person relationships

Personal and Staff Development

- Create a "teachable vision" – a vision of the future that everyone in the company can grasp and understand
- Seek coaching and mentoring from other effective leaders, both within and outside the organization
- Conduct a leadership self-assessment every year
- Identify at least one leadership skill gap and develop and implement a plan to remedy the gap
- Coach and mentor at least one staff member who has leadership potential

Work Climate

- Make realistic promises and keep them
- Develop a flexible budgeting system to permit employees to make some financial decisions on their own
- Provide clear goals to staff and leave it up to them to determine how to attain the goals
- Sponsor yearly surveys of employees to determine their perceptions of organizational climate
- Develop and implement an action plan to improve employee perceptions of trust
- Identify and correct situations where work-unit actions are inconsistent with unit vision or corporate values
- Hold yourself and the employees accountable for actions and results without being blaming
- Focus on the present and the future and encourage staff to do so
- Make decisions based on "the big picture" and the demands of the current problems
- Identify the best and brightest employees and retain their services and loyalty
- Take personal risks by being authentic, open, and honest

- Improve employee job satisfaction ratings by 20% next year
- Recognize employee contributions publicly and privately and share the spotlight for successes
- Focus on action and timing and avoid "analysis paralysis"
- Show confidence in staff by delegating important work to them

See also: Productivity/Process Improvement/Organizational Results, Communication

Productivity/Process Improvement/Organizational Results

Goals in this section can be used for managers and supervisors and are related to responsibilities for improving productivity, becoming more cost-effective, and contributing to the overall results of the company.

Productivity

- Increase total work-unit output by 3% this year
- Reduce labor costs by 3% in work unit without lowering output
- Increase profit margin by 3% per year without negatively impacting customer satisfaction
- Research and identify possible capital investments required to update equipment to improve productivity
- Ensure that any capital expenditures to increase productivity achieve complete cost recovery within three years
- Identify and provide for staff training identified as needed to improve productivity
- Set yearly productivity improvement goals and communicate them to all staff
- Ensure that each employee understands his or her role with respect to improving productivity for work unit
- Ensure that no productivity is lost as a result of employees being unclear about work-unit priorities
- Delegate authority to employees so they can respond to productivity barriers quickly or immediately without requiring further approvals
- Reduce by three weeks the time it takes new hires to become fully productive
- Identify any staff members whose productivity is below average and use performance management procedures to help staff members improve
- Monitor staff and take action if any employees appear to be lowering the productivity of their colleagues

Process Improvement

- Educate all staff in the use of process improvement and basic statistical tools
- Create a climate so employees at all levels feel comfortable enough to offer process improvement suggestions to managers
- Monitor statistical reports on process problems in order to improve process
- Implement local suggestion box system that generates at least one process improvement idea per month that is implemented
- Communicate proactively with employees to help remove barriers to improvement

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 47

- Identify root causes for problems, as demonstrated by productivity improvements resulting from correct diagnosis and remediation strategy
- Contribute in an active way to the company's process improvement team
- Request assistance from executive managers when a process improvement requires their approvals
- Model for employees the importance of a continuous improvement philosophy
- Use performance management to improve processes rather than assign blame for errors

Organizational Results

- Ensure that the work unit achieves goals and objectives for critical responsibilities
- Proactively provide executive managers with the information they need to prioritize expenditures to improve company results
- Subordinate the work unit's budgets and needs to the improvement needs of the organization
- Provide input into any overall downsizing strategy, to minimize the negative impacts on company productivity
- Coordinate with other managers to reduce duplication of effort or wasted effort
- Identify and recommend actions that will result in cost savings for the company through outsourcing
- Become a company resource for teaching other managers about applying process improvement tools

See also: Work Outputs and Productivity

Communications

Goals in this section are relevant to all personnel who have staff reporting to them; these goals relate to communications within the organization and with clients.

Downwards

- Communicate work-unit goals to staff so they understand the bigger picture
- Help employees understand their roles in the organization and how they can contribute
- Share information with staff as soon as possible
- Operate on "want to know" rather than "need to know" in terms of what is communicated to employees
- Explain why things are done a certain way, and not only how they should be done
- Create communication climate so employees are comfortable questioning and challenging decisions
- Provide feedback that majority of employees feel is fair and constructive

Customers/Clients

- Make final approvals on any written/promotional material seen by customers
- Handle 80% of phone calls from angry clients on first call and to the satisfaction of the client

- Collect customer satisfaction data by contacting at least five customers per month
- Communicate bad news to clients effectively and respectfully

Peers

- Refrain from withholding information from other managers that is important for their success
- Coordinate work with other units to reduce duplication of effort
- Apply a consultative process when project involves decisions that may affect other work units
- Participate actively in division management meetings and chair the meetings at least once every six months
- Maintain effective communication with all division managerial peers regardless of personal feelings
- Use effective communication techniques to address conflicts with peers
- Eliminate any need for involvement by the vice president to resolve conflicts with managerial peers

Upwards

- Communicate so there are no surprises to managers higher in the hierarchy
- Inform your manager of any events of critical importance, to the satisfaction of your manager
- Prepare and submit all reports as required, on time
- Identify and communicate sales shortfalls at least one month before end of quarter
- Suggest at least two cost-saving initiatives each quarter to your manager

See also: Communication, Customer Service and Support

Source: Perfect Phrases for Setting Performance Goals, Max, Douglas and Bacal, Robert, 2004. **For use as starting point for SMART goals.** 49