BRIDGESPAN

Where Trust and Technology Connect

Setting Objectives

Leader Guide

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INTRODUCTORY MATERIAL

MODULES

Getting Started

About This Guide

What's the purpose of this guide?

This leader guide provides a master reference document to help you prepare for and deliver the *Setting Objectives* program.

What will I find in the guide?

This leader guide is a comprehensive package that contains

- the workshop delivery sequence

- checklists of necessary materials and equipment

- presentation scripts and key points to cover, and

- instructions for managing exercises, case studies, and other instructional activities.

How is this guide organized?

This section, "Getting Started," contains all of the preparation information for the *Setting Objectives* program, such as learning objectives, pre-work, required materials, and room set-up.

Following this section is the "Training At A Glance" table. This table can serve as your overview reference, showing the module names, timings, and process descriptions for the entire program.

Finally, the program itself is divided into *modules*, each of which is comprised of one or more *lessons*. A module is a self-contained portion of the program, usually lasting anywhere from 20 to 90 minutes, while a lesson is a shorter (typically 5-20 minute) topic area. Each module begins with a one-page summary showing the Purpose, Time, Process, and Materials for the module. Use these summary pages to get an overview of the module that follows.

About This Guide, continued

How is the text laid out in this guide?

Every action in the program is described in this guide by a text block like this one, with a margin icon, a title line, and the actual text. The icons are designed to help catch your eye and draw quick attention to "what to do and how to do it." For example, the icon to the left indicates that you, the instructor, say something next. The title line gives a brief description of what to do, and is followed by the actual script, instruction set, key points, etc. that are needed to complete the action.
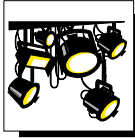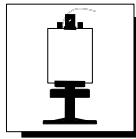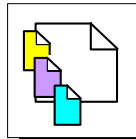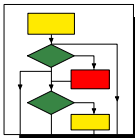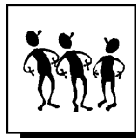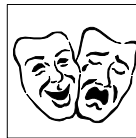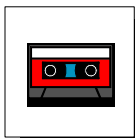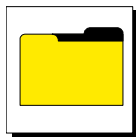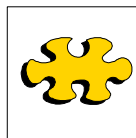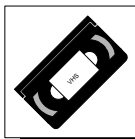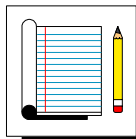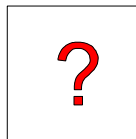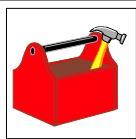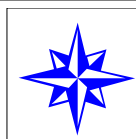
A complete list of the margin icons used in this guide is provided on the following page.

TRAINER NOTE

You may also occasionally find trainer notes such as this one in the text of this guide. These shaded boxes provide particularly important information in an attention-getting format.

About This Guide, continued

Graphic Cues				
Module Purpose	Overhead	Participant Workbook	Lab Exercise	
Time	Transition	Flipchart	Handouts	
Module Process	Break / Lunch	Group Activity	Role Play	
Materials Required	Audio Tape	Case Study	Instructional Game	
To say	Video Tape	Assessment / Quiz/Test	Question & Answer	
Key points	Computer/ CDROM	Tool	Welcome	

The Program In Perspective

Why a *Setting Objectives* program?

In any company environment people typically learn how to articulate goals and put plans into action to attain them. This course supports employees through the process of assessing the organization goals and developing strategies to compliment their current knowledge and develop additional skills. Personnel can then develop confidence in their own skills and abilities to perform their job and provide excellent customer service.

Management starts the process by setting organizational objectives that are then used to develop team objectives. The team objectives are then used by individuals to develop their personal objectives. Your manager will ask you to make a first start with setting your objectives, meeting with your manager to determine the alignment and accuracy of these objectives, making any changes as a collaborative effort.

Learning Objectives

After completing this program, participants will be able to:

- State why clear objectives are important to all parts of an organization.

- State how each part is essential to the overall success of meeting the corporate objectives.

- Describe techniques for creating clear objectives.

Program Timing

45 minutes

Number of Participants

12 – preferably an entire team, including the team leader or manager

Program Preparation

Pre-Work

Prepare as many Participants Guides as necessary for each participant.

This material is designed to assist employees with setting their own goals and as they are supporting the team goals and organizational goals.

Ideally, you should invite the manager and the entire team to a single class so that the team objectives can be used as examples for the exercises. If you are unable to have an entire team off the floor at one time, separate the sessions and invite the attendees to select a date and time, but remind them to bring their team objectives with them.

In this way, examples from the different team goals can be used as examples to determine individual goals.

Required Materials

- Leaders Guide
- Participants Guide
- Corporate and Team Objectives

Room Set-Up

Set up tables for participants to be able to take notes and share information comfortably.

Use a room that has a white board or paper easel for documenting discussion points.

Program Preparation

Instructor Preparation

Ensure that you have a copy of the team objectives before so that you can prepare common objectives and examples for each person to work their own objectives list.

Training At A Glance

Time	Module	Description
45 minutes	Objectives	Participants will explore setting objectives and how those objectives are used to define career development goals.
20 minutes	Career Planning	The participants will review the process of setting career developmental action items.

Objectives
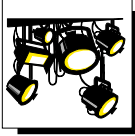
Purpose

The purpose of this module is to have participants explore the process of setting goals. In addition, ideas will be exchanged on using objectives to set career development goals.
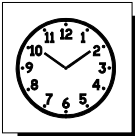
Time

45 minutes
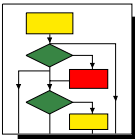
Process

Participants will explore setting objectives and how those objectives are used to define career development goals.

Materials Needed

- Participants Guide

- Performance Objectives Form for the students to write on

- The organizational objectives written on a white board or flip chart

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What Are Objectives?

Have Participants read this section, then discuss.

Objectives are those specific steps that enable you to accomplish a goal. Setting objectives involves a continuous process of research, decision-making, evaluation, measurement, and realignment. Knowledge of yourself and your team is a vital starting point in setting objectives.

Managers are required to get specific tasks done by their team. To do this effectively, the team members must understand their individual contributions to the activity. This means that each individual has to have his or her own specific objectives and how these objectives assist in supporting the team to meet its objectives.

So, you wonder "what's in it for me?" Setting objectives allows you to understand exactly where you stand within your role in the organization and your responsibilities. You have a better understanding of the value you bring and your contributions to the organization. You have objectives as a method to measure your own success.

One benefit of clear and precise objectives comes when a manager and you sit down for an appraisal review. With clear objectives, the discussion of past performance is more specific and will leave time to review and revise objectives for the coming period and to discuss career aspirations. It is imperative that you are a part of defining your objectives, so you recognize your responsibilities. The effort between you and your manager to define these objectives is critical.

A report by two psychologists (Latham & Locke in 'Who's the Manager?' F. Patten 1981) found that staff commitment was highest when their work was:

- Focused on set goals
- High in volume
- Against specific deadlines
- Part of a smooth working routine

These can be incorporated into good performance objectives. As the saying goes…

> "If you do not know where you are going, do not be surprised if you do not get there!"

What Are Objectives?

Why bother; what's in it for me?

Studies have shown that imposing objectives on employees does not work as an effective management process. Employees want and need input into the decisions that affect their jobs. Autocratic leadership styles that worked in the past are in direct conflict with today's need for employee involvement and commitment. This means a better relationship must be established between the employees and supervisors when setting objectives.

Both participants must view the supervisor and employee dialog as central to the setting objectives process. Both entities must recognize that they, together, are the main beneficiaries of the process, not the system, not the company, not upper management, not the human resources department.

Employee and Supervisor must be able to answer the question, "What's in it for me?"

What Are Objectives?

What's in It for Employees?

- Setting objectives with a supervisor provides the employee with the opportunity to contribute to the way the job is going to be done.

- The process of a collaborative effort to setting objectives increases the employee's commitment and motivation to those objectives.

- The process also ensures thorough understanding of what is expected.

- Setting objectives achieves a clear and concise understanding of how work will be measured and evaluated, enabling the employee to evaluate their own performance during the appraisal period, and make adjustments as necessary.

- Objectives clarify the employee's priorities and allow them to allocate their time and resources effectively.

- The process of setting objectives allows employees the opportunity to voice their problems, concerns and ideas about what is to be accomplished.

What's in It for Supervisors?

- Setting objectives with employees defines how each employee will contribute to the achievement of the team objectives, and those of the supervisor.

- The process of setting objectives ensures that goals are congruent and that assignments and resources are clearly allocated among all employees.

- Setting objectives with employees commands a much greater commitment from employees to specific objectives.

- The process of setting objectives establishes the basis for the next performance appraisal and identifies the employee's concerns and needs for assistance and support.
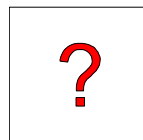
Can you think of any other benefits to being involved in this process of setting objectives?

Defining Smart Objectives

All goals and objectives must be SMART.
SMART is an acronym for:

Specific
Measurable
Achievable or attainable
Realistic or relevant
Timely and trackable

Specific	Is the objective precise and well defined? Is it clear? Can everyone understand it?
Measurable	How will you know when the task has been completed? What evidence is needed to confirm the completion? Have you stated how you will judge whether it has been completed or not?
Achievable	Is it within your capabilities to complete? Are there sufficient resources available to enable this to happen? Have you relied on someone else or some other thing to occur before you can complete the objective? Can the objective be completed at all?
Realistic	Is it possible for you to perform the objective? How sensible is the objective in the current business context? How does it fit into your overall pattern of work?
Timely	Is there a deadline? Is it feasible to meet this deadline? Is it appropriate to do this work now? Are there review dates?

Reviewing Objectives

Objectives are needed so that you know your responsibilities within the organization and have them as milestones against which to check your performance throughout the year.

This breaks down into three prime areas:

- Task
- Time
- Style

Task

What precisely are the tasks that you are expected to perform? Are there any measures on these tasks - numbers of files to be processed in one day? Closings to be scheduled per day? Customers to be served in one hour? The more precisely you can set down the tasks, the easier it is for you to perform them.

When someone starts a new job there is usually an induction period and the tasks they have to do are clearly expressed. Once someone has been in the job for a while there is a tendency to assume they 'know what to do' and they are left alone. However, circumstances change, other team members change, strategic goals change and it is good to specify the tasks for each member of the team on a regular basis.

An appraisal interview is an ideal opportunity in which to discuss changes in these objectives and to set and agree on operating objectives. This is particularly important where there is a need for team members to work together - this way you can prevent two prime errors - repetition of work and/or everyone thinking that someone else was doing this piece of the task.

Reviewing Objectives, continued

The task portion of an objective should be focused on a result, not an activity. Define what it is you should be accomplishing as a result of some activity. Be consistent in your definition of the results you want.

For example, "create and implement a plan to increase customer applications for available loans" is a more precise goal than "create a web page or newsletter listing loan sources and distribute to customers." The first example holds the individual accountable for an outcome – increasing the applications, the second for an action. That action may be part of what the employee will do to accomplish the goal, but does not make him/her responsible for the results of the goal itself.

An even better goal might be to hold the employee accountable for "increasing successful customer applications for loans". This is only appropriate for an employee who has the means available to influence that outcome.

Times

Deadlines are needed. Define by when you believe the work should be completed - and also in what form (initial ideas, final report, quick brainstorm, collected views of the team). When setting deadlines, management and the individual should discuss these to check for realism - can the work be achieved in the time set? If not, what can you alter - time? number of people working on the task? final state of work (that is an acceptable first draft)?

Realism is the key - there is the tale of one in-house IT department at the launch of a new major project with the 'customer' present where someone asked, "which of these deadlines can we miss?"

Realism should be combined with accountability. Just because management may have dictated an objective, is the objective something the individual thinks he or she can realistically accomplish?

Reviewing Objectives, continued

Style

Style means the behavior and manners expected of the individual - how they do their work, not what they do. Some organizations work with behavioral competencies that focus on the manner in which people work together. Behaviors are what people see and react to. Individuals need to know how their behavior affects others and whether it helps or hinders their work. Apart from the general 'rules' about behavior in the office it can be hard to talk with someone on their own behaviors. This is where the rules of feedback and collecting data on performance are key as is the establishment of an open atmosphere in the working environment.

An objective using our example can include more than one of these behavior factors. The objective may be stated: "create and implement a plan to increase completed customer applications for appropriate, available loans by the end of the first quarter", for timeliness, and could add the desired quantity of increased applications "by at least 10%", or by the number of new customers who apply for loans, or an increase in customers in different geographical areas who apply. Cost may be included as "with no more than a 5% increase in budget", or "within budgeted funds". In this example, quality is addressed by the adjectives "complete" meaning the applications are correctly prepared, and "appropriate" meaning customers are applying for loans targeted to their area of need.

The best way to identify the style is to ask questions. What is the indicator that an employee in this position is making the customer (both internal and external) happy? Let's say that you have reviewed an objective and an employee's performance and rated it as simply satisfactory rather than exceed expectations, as an example. Could anyone (individual or manager) logically or reasonably disagree with your rating? In other words, were any of your ratings subject to opinion? If the answer is "Yes" to the above question, go back to the drawing board - a performance standard must not be subjective.

Reviewing Objectives, continued

Let's look at a couple of other things.

Positive: Have I used positive language?

Goals written in a positive language tend to support accomplishment more than goals that are expressed as they relate to a negative or undesirable condition.

> Wrong: Do not waste paper.

> Right: Reduce paper use.

Compatible: Is there any conflict with my other goals? Will it affect anyone else? Is there a conflict with others I care about? Is it compatible with society? i.e. legally, ethically or environmentally. Is it compatible with my team or organization goals? I wonder if anyone else might like to try this too?

Challenging: Is it sufficiently challenging? Is it too hard? Is it too easy? Have I broken this down sufficiently into manageable chunks? What happens if I reach perfection? How do I maintain that Eureka feeling? Am I interested?

Internalization: Can I picture myself completing this goal? Can I see all my friends congratulating me? Does it highlight a possible conflict with other goals?

Role model: Do I know someone who had a similar goal and successfully accomplished it? Can I learn anything from the way they went about it? Can I talk to them of their experiences? Will it be helpful to get a friend to support me?

Commitment: Am I committed to seeing this through?

Rewarding: What's in this for me? What is the immediate benefit of successfully completing this goal? What other secondary benefits will I experience? What shall I do to celebrate?

Reviewing Objectives, continued

As a manager and as an employee, it is important to set SMART objectives. Each objective must be easily understood by all so that there can be no ambiguity when discussing performance. The key question to ask anyone at goal setting time is:

> " How will we know that you have been successful? What will we see, hear, touch, find, use that assures us that you have achieved this objective?"

The duties and tasks outlined in the job description and the team objectives set by upper management should form the basis for your objectives. You will probably need to consolidate some of these into larger categories, and add measurement criteria to define your expectations.

For instance, the job description may say, "maintain accounts payable files" as a single task. An objective that you might created based on that task might combine it with a reporting task, and add criteria such as "maintain accounts payable files and distribute accurate reports to appropriate parties on a monthly basis."

Is this sample a SMART objective?

Let's discuss. Does it have all of the appropriate criteria?

If each objective is measured against this key question and given a time limit and resource allocation then both the manager and the employee can monitor progress during the period and measure achievement at the end. Equally this will make it easy to see where successes arose and deficiencies occurred.

Let's not forget - Be careful not to set too many objectives. If you do, you'll lose focus. You won't be able to use your objectives in managing your day-to-day activities. Consider this -- If you can't memorize your objectives, you've probably got too many. For the memories of most of us, that's about six.

Reviewing Objectives, continued

Eliminate "WHY" and "HOW"

In writing objectives, we must eliminate the "why" and the "how." If we need to discuss "why" we're interested in increasing sales by 15% next year, we'll have that conversation during our planning sessions. But we won't explain "why" in our objective statement attempting to justify that objective to those who read our plan.

Neither will we describe "how" we'll accomplish the objective. At least not at this point in the process. We won't write an objective that says, "We'll increase sales volume by 15% next year by implementing the following three programs...." The answer to "how" is really a strategy. Developing your strategies occurs in the next step.

We should establish results-oriented objectives whenever possible. There are two kinds of objectives we can develop -- results-oriented and activities-oriented. Results-oriented objectives are stronger. Let's use them.

Example: "We will increase dollar sales by 15% next year." That's a results-oriented objective. "We will increase the number of sales calls by 15% next year." That's an activities- oriented objective. Obviously, the first is a stronger statement.

Let's discuss why these two examples are different.

We will increase dollar sales by 15% next year. (qualifying)

We will increase the number of sales calls by 15% next year. (quantifying)

What is the difference?

Managing Objectives

Whenever possible, we write our objectives in terms of a result, rather than an activity.

There are times when we simply can't write a results- oriented objective, and if so, we will write our objective as an activity. But these are the exceptions. "Install the new computer system by the end of the year," "Hire a manager of human resources by June 15th," "Complete the new marketing plan by the third quarter." Each is an activity-oriented objective. Each is used because no result (other than the completion of the activity) can be measured. Each, however, is an exception. Generally, our objectives are results-oriented.

TRAINER NOTE

Let's use the following sections to assist our managers in understanding how to set general objectives so they can assist their employees to create their own objectives.

Managing Objectives

Difficult or Hard?

Objectives must be quantified – this is the M in SMART, measurable. When our objective is due for accomplishment, we've got to be able to measure it to figure out whether or not we've succeeded. More importantly, everyone in the organization has to know how hard to "push to go get it." We've got to quantify our objectives.

Sometimes that's easy. Sometimes it's not. Depending on the category of the objective. Financial objectives are the easiest to quantify. After all, the world of finance has numbers on a piece of paper. And some objectives such as marketing or sales objectives are usually easy enough to turn into numbers.

But how about something like customer satisfaction? A pretty gray area, isn't it? Some say customer satisfaction is so difficult to quantify, that we can't do it. Or can we?

Sure we can! We can count complaints. We can measure defective products. We can count referrals to new accounts. Or repeat business. Or correction costs. In every case -- in all of these suggested ways to measure customer satisfaction -- we've taken the same approach. We've decided that customer satisfaction is so difficult to measure, that we'll measure something else. Something we believe parallels the issue of customer satisfaction.

Managing Objectives

Attainable?

Finally, an objective should be challenging and, at the same time, attainable. Your employees should understand that accomplishment of the objective requires that they "reach, " stretch to expand their knowledge and skills. Given that reach, they should expect they can accomplish the objective and that the objective is achievable.

Consider a basketball court and the basketball hoop. The hoop is ten feet above the floor of the gymnasium. At that ten-foot level, the game is both challenging and attainable. If the hoop were four feet above the floor of the gymnasium, it would not be challenging.

If it were a hundred feet above the floor of the gymnasium, it would not be attainable. It's our job, as managers, to keep our players playing the game. We must find that "ten foot level" for each objective. We must make each of our objectives both challenging and attainable.

Managing Objectives

Reachable?

Objectives should be in alignment with the team objectives and the organizational objectives. We can agree to write down an objective and say "Yes, that's fine. I think I can do it. I commit to it." Then go on to the next one and do it again. And again. It's one thing to take each objective one at a time. And it's quite another to write all of the objectives on a piece of paper, tack them up at the front of the room and take a long, hard look at them. Ask, "Can I do all these objectives all at the same time, or within the allotted time frame?" Do I have a month, a quarter, or a year to accomplish this objective?

Example: Let's imagine we're upper managers working with a company participating in an industry enjoying very fast growth. Sounds familiar, eh? During our objective setting session, we decide, because we're environmentally conscious and cost savings conscious, we'll set an objective that says "We will reduce paper use by ¼ of current usage." O.K., we write it down, and we've got our first objective.

A bit later, we remember that a particular customer that lends primarily in Texas has not had as many orders as usual. Why don't we set an objective that calls for increasing our business with this customer? Let's set an objective that says, "During next year, we'll have, on average, increase Client A's orders by 15% than last year."

See what we've done? We wrote a set of objectives calling for reducing paper usage within one year and, at the same time, increasing business with Texas files requiring a heavier usage of paper due to the Texas requirement of having a physical file that is not mainly electronic. But the two are conflicting objectives, aren't they? By growing Client A, we will have to use more paper.

My point -- look at your objectives all together to make sure they're in alignment. If not, make a choice. Choose among conflicting objectives. Cross out one or the other. Or modify one or the other. Either way. Just so when you're finished with your list of objectives, you believe you can accomplish them all at the same time.

Managing Objectives

Role Model?

If you know someone who has had a similar goal and has successfully accomplished it, can you learn anything from the way they went about it? Can you talk to them of their experiences? Communicating with others in the workplace is a very effective ways of formalizing and accomplishing your goals. Inspirational people have an amazing effect, search them out!

Rewarding?

Ask these questions of yourself. What's in this for me? What is the immediate benefit of successfully completing this goal? What other secondary benefits will I experience?

The right degree of challenge is a motivator. What happens if I reach perfection? How do I maintain that Eureka feeling? When you attain that feeling - bottle and savor it!

Setting Your Objectives

Let's look at the organizational objectives and team objectives.
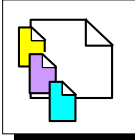
Distribute the following handout(s):

Performance Objectives form

Your team objectives are what you need to see in order to set your own objectives.

You should consider what you can do in order to assist the team to meet these objectives.

Also note that within the Performance Objectives that there are categories of objectives.

Operating objectives are those that support the operations of the organization.

People Development identifies ways in which you assist others in developing their knowledge and skills, similar to participation in the interdepartmental cross-training effort.

Strengthening the business objectives identifies ways you can assist the organization in building the business.

An Example

First iteration.

What? I have to do this more than once? Of course! Always re-examine your objective statements.

Let's say a Scrabble team's objective is: To increase vocabulary

You should be thinking…. My main goal is a bit vague, what am I doing this for? How am I going to test this? When am I going to get the time? Where am I going to do this? Who else has tried this? Will they help me? Why am I doing this?

Okay, so we need to identify my goal: **To add ten new words to my vocabulary every week.**

Is this a specific objective? In the short term, yes, but probably better stated on a daily basis.

Is this measurable? At the end of the week I could test myself, but I haven't stated that in the goal. Or should I be looking at how this will improve my Scrabble game? Scores? Wins?

Is this objective achievable and realistic? Perhaps a little bit too easy as one word may have different spellings and form others such as gerunds, adverbs and adjectives. However one word may have a number of meanings. Where am I going to get the random words from? If it's for Scrabble it should be from the Official Scrabble Players Dictionary(OSPD) and wouldn't it make more sense to learn words that will actually be playable regularly.

Timely: When during the week am I going to do it?

An Example

So, we've looked at the SMART items. Let's look at a couple of others. For each item, mentally question the objective statement and answer it.

Positive: Yes, the objective is very positive.

Compatible: It shouldn't affect anyone else as I'm only going to be spending an hour during the week doing it, but again no mention of how much time I'm going to spend on it in the stated goal. I wonder if anyone I know would like to do the same? Could I work with someone else on this objective to make it more fun?

Challenging: It will be if the goal is correctly stated, perhaps I should have a few more words? Am I expecting to get 100% every time?

Internalization: Can I see myself actually finding people that will understand the words I've learned? I can picture myself taking a test and seeing the words on the page and smiling. Or playing the words at Scrabble - perhaps that's why I want to do this?

Ownership: This is for me and I've thought of this - so yes I own it.

Role model: Are any of my friends or co-workers doing the same thing? Who could help?

Commitment: I've tried this a number of times and stopped after a couple of weeks. I am willing to make the time to commit to this objective.

Rewarding: I'll win more games, so that's a great motivator. I'll gain greater confidence in my ability to communicate. Plus, I can sound really important at parties.

So, we review this. What do we find?

So it would seem that I really want to increase my vocabulary to win at Scrabble? It's also apparent that from a rather vague goal statement that I haven't really thought this through. I'm going to have set some more individual actions to meet this objective. I can go to the next iteration.

An Example

> **Second iteration.**
>
> So, let's re-phrase the team objective: **To increase our team's vocabulary by 1000 words and to improve our wins at Scrabble by 10% this year.** This is much clearer. No, we may not be able to change a team objective; but we can identify improvements and change our own objectives to meet the needs of the team.
>
> So, an individual objective could be: **To add three new words from the OSPD to my vocabulary every day and test myself at the end of the week with 90% recall as a measurement of success.**
>
> Is this objective specific? Yes.
>
> Measurable? I think it's better to measure the win percentage as part of another goal. That might affect this goal in so far as I might need to change the number of words I'm learning - so best to review the entire hierarchy of goals at a specific time. That could be a separate goal?
>
> Achievable and realistic? Adding 3 words everyday is reachable.
>
> Timely: Still haven't specified when exactly and how much time within the week I'm going to spend. But, I am still committed to taking the time to make this happen.

An Example

Let's look at a couple of other items.

Positive: Yes, very positive.

Compatible: It could upset the regular players at the Scrabble club if I get too good? But it might also encourage them to learn more which would help me.

Challenging: Yes.

Internalization: I can see myself playing the words at Scrabble.

Ownership: Yes I own it, but will these words be any use outside Scrabble? Perhaps I should restate my objective?

Role model: I am unaware of anyone I know who is doing this. I shall continue to check and perhaps encourage people by my success.

Commitment: Previous failures I think are due to not having clear objectives. So, I can overcome previous mistakes and make it this time!

Rewarding: Yes I'm happy that I'll be sufficiently rewarded.
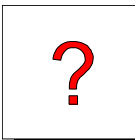
Have we identified a SMART objective?

An Example

> **TRAINER NOTE**
>
> You may wish to use an analogy that is comfortable with everyone, including you. Let's look at the North Pole and Santa's workshop as an organization. The organizational objective is to deliver quality toys to all children in the world on Christmas Eve.
>
> Valid?
>
> What would the team objectives be? Toy Makers – boys toys, girls toys, adult toys (get real, we mean board games and card games!); Reindeer handlers; kitchen staff, housekeeping, etc.
>
> How would individual objectives support the organization objectives and the team objectives?

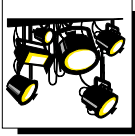**Transition to Career Planning**

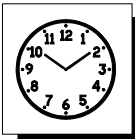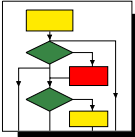# Career Planning

Purpose

The purpose of this module is to explain how career planning aligns with objective setting.

Time

20 minutes

Process

The participants will review the process of setting career developmental action items.

Materials Needed

- Participants Guide
- Whiteboard or flip chart for recording ideas
- Performance Objectives form

Development Plan

For each objective or set of objectives, there should be a development action.

You need to identify what external help could you use to assist you in meeting your objectives?

Within planning where you want to go from here, there are several factors involved.

The main factor is YOU. Know your innate qualities - ask yourself: "Whether I produce results as a decision-maker or an adviser?" If you are not a decision-maker, don't take decision-making assignments.

Understand your learning style: how you absorb information better - through seeing, reading or through listening? Knowing your style is the first thing to know about how you perform. Once you understand which is your naturally dominant learning style you are in a position to improve the way you perform.

Consider your values as well as your strengths, weaknesses, and personality.

If you're not sure where to start the planning process, try using the steps below.

1. Assess Yourself.
2. Explore Your Career Options.
3. Set Career Goals.

Assess Yourself

Figure out where you are, before you think about where you're going. If you haven't already, try taking assessments. Assessments are tools that help you discover important things about yourself. Career assessments match you to careers based on different things - like your interests, skills, and work style.

There are a lot of assessments out there and each one is different. They come in different formats and some are more reliable than others. Take as many as you can and compare the results you are given. Don't feel like you have to do anything an assessment says. Instead approach your assessment results as new options to think about.

For more information:

- Use ISEEK's Skills Assessment at http://www.iseek.org/sv/12398.jsp

- Search for assessments on ISEEK at http://www.iseek.org/sv/81001.jsp

- Find WorkForce Centers. They have assessments and computers you can use for free such as those at the Texas Workforce Commission http://www.twc.state.tx.us/customers/jsemp/jsempsub4.html

There are even graduate students at local universities that are working toward degrees designed to allow them to assist others in defining career preferences and career development options. You might be able to get included as a participant in a free survey to help you understand your own needs.

Whether or not you chose to take assessments, you will have to think about a career path you want to take. Consider past experiences that you felt were particularly rewarding. Examples of these experiences could be jobs, volunteer activities, parenting, going to school, or working on a hobby. Make a list of these experiences and think about why they were so satisfying. Use this process to identify new experiences that you might also find satisfying.

Remember that skills (and skill assessment) are just one piece of the larger career exploration "puzzle." Career explorers also need to look at interests, values, labor market information, etc. Identifying your skills is a very important, but time-consuming process. Be prepared to spend some time in this area to achieve the best results.

Explore your career options.

Before you make any big career decisions, take advantage of the information that's available. This information can help you answer questions you have.

- What careers do you find interesting?
- How much education and training will you need for certain jobs?
- Will you need a license?
- Do you want to be the boss?
- What career paths are available to you where you are?

Consider the following statement,

"I am currently managing an closing department of five people. The compensation that comes with managing the department is great. The only problem is that I really enjoy closing files," an employee wrote recently. "I have been wrestling with the idea of which career path I should stick with: managing, where the challenge and money is great and the work is OK, or settle for less and go back to closing and processing files where I can deal more with our customers."

What are the considerations this person should be making? Can you think of a list of pros and cons on each side?

TRAINER NOTE

Use this exercise to create a pros and cons list on the white board. Allow each student to ponder the idea and offer considerations that should be made.

Don't explore your options alone. Use the people around you to help you think about what to do next. Talk to teachers, professors, relatives, friends, career counselors and other professionals about your career options

You would document your assessment on the back of the Performance Objectives page.

Identify your strengths. Then, identify your weaknesses.

What are you good at? What would you like to improve? What have others told you that you should work to improve?

Set your career goals.

After assessing yourself and exploring your career options, you set action items. Action items are ideas about what you want to accomplish. Defining your actions will help you take the necessary steps to enhance your career. Start by thinking of a long-term career goal - like becoming a closing manager. Then think about the things you will need to do to reach your long-term goal. For example, you will need to go to school to learn more management skills before you can be an effective manager. These smaller steps are your action items.

Use action items to complete your Development Plan.

Development Plan			
Employee Career Interests	Outline your short and/or long term career goals		
Individual Assessment	Identify your strengths and areas requiring development based on responsibilities, objectives, and the Core Values		
Strengths		**Areas Requiring Development**	
•		•	
Development Plan	This plan should reflect a balance of your interests with the immediate and future needs of the company.		
Development Focus	**Actions Planned**	**Application To My Job**	**Status/Timing**
•	•	•	•

Remember that you can have as many action items as you want and that you can change them anytime. Once you reach your goals, it is essential to set new action items that motivates you to keep learning and striving for satisfaction.

Remember the world of work changes quickly and so do you; repeat these steps anytime you need to as you develop new skills and preferences.

How do you gain skills?

Volunteering is an excellent way of improving your skills. For example, if you're interested in teaching, volunteer at a local school. If you want to learn about desktop publishing, volunteer to help with the newsletters for a church or animal adoption program. Be creative when thinking about volunteering opportunities. This is a great way to explore and test new skills while making a meaningful contribution.

Once you have found an interest in a skill set, start researching possible education and training programs. These programs could range from a four-hour seminar to a four-year degree. The Internet offers information about all types of training and education programs, and many cities have businesses that specialize in offering short training courses. You can also talk to people within your office who work in the role you're interested in—they may have taken classes or may be able to recommend a particular school.

Find out if there are professional organizations that focus on topics in which you have an interest. Find out when and where they hold their meetings and start attending so you can learn more about the organization and the topics of interest.

Items that you may wish to include in your career path need to reflect a current association and a potential future association with your career. For example, if you are just out of college and have no business experience and no management experience, requesting a class in managing large groups in multiple locations might be a development plan that is a bit too early in your career path. However, finding a class that will assist you in developing your judgment and decision-making skills and a business writing class that will assist you in developing your communication skills in preparation for future management is not a bad thing.

Discover what cross-training efforts are present so you can learn process and other type of skills that are specific to your organization and your business interests. Discuss with your manager what steps need to be taken to get you involved in that training effort.

Summary

Setting clear and achievable objectives is a key start to any successful organization.

Without clear objectives, the team or organization's success becomes unfocused when measuring past performance. The acronym SMART is best used when setting objectives and also asking the key question on evidence of a successful outcome.

The best strategy of managing your career by objectives include the following:

■ All individuals within an organization are assigned a special set of objectives that they try to reach during a normal operating period. These objectives are mutually set and agreed upon by individuals and their managers.

■ Performance reviews are conducted periodically to determine how close individuals are to attaining their objectives.

■ Rewards are given to individuals on the basis of how close they come to reaching their goals.

This is a continuous process that is not limited to your performance review date. You can reassess or continue to assess the validity of your objectives and development plans as often as needed to adjust to your needs and your environment.

Don't forget, your performance plan is within your control. If your manager doesn't review your performance in a timely manner, you can take the initiative to start the process.