



# Leading remote teams: Goal Setting Tool

## Creating purpose

Employees who understand how their roles are tied to the strategy of the company and how they contribute to organizational success are more engaged. Setting clear goals can help achieve this. Companies are shifting from a culture of measuring success by the number of hours an employee puts in, to a goal and results oriented culture—this shift is even more important to your success if you're adjusting to leading teams remotely.

The responsibility for setting goals should be shared. As a leader, you will communicate the direction. The employee can then use the three-step process below to write their goals. Together, you can adjust and finalize them.

- 1 After your strategic priorities and business plans have been defined, ask employees to use these worksheets to develop their responsibilities and S.M.A.R.T objectives.
- 2 Employees should consider their job in relation to the key business imperatives and areas of focus of your company and how they can best contribute in the upcoming year.
- 3 The completed worksheets should be shared in your planning discussion to validate their objectives and firm up their commitments and deliverables.

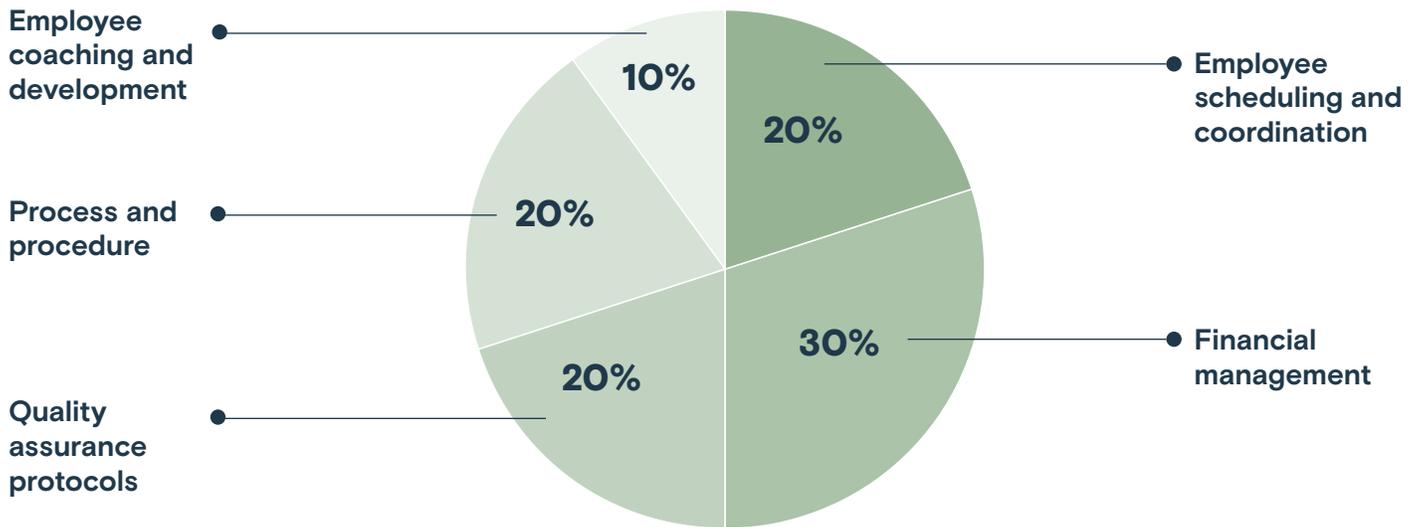
# Worksheet 1:

## Identify your responsibilities

Identifying the various responsibilities that make up your job will provide context for constructing S.M.A.R.T. objectives. A responsibility is an area of your job where you are responsible for specific results. It defines what you are doing, why you are doing it, and how you do it.

Divide the job pie below into responsibility “slices”. Record the responsibility and approximate percentage of your time that slice takes up. The job pie can include project responsibilities as well as job accountabilities. (Note: It is likely you will have between five to eight slices in your job pie).

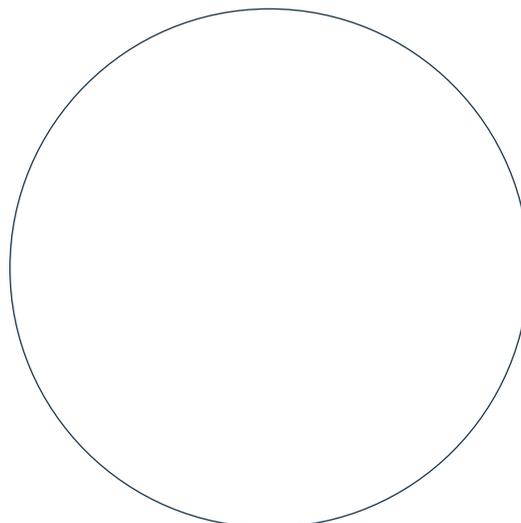
Example: Job pie for operations manager



## Create your job pie

Job title/function: \_\_\_\_\_

Print and complete your pie below:



# Worksheet 2:

## S.M.A.R.T. Objectives

Write a S.M.A.R.T. objective that relates to one of the responsibilities identified in your job pie.  
(See example below)

Goal setting guidelines	
→ <b>Aligned</b> to the company strategy and supportive of the team manager's goals	→ <b>Fair</b> to employee and the employer, with considerations made for experience, time in role, skills, and other relevant factors including circumstances due to Covid-19, for example.
→ <b>Customised</b> for to your job. Include actions and metrics that will measure success.	→ <b>S.M.A.R.T.</b> goal principles followed.
→ <b>Representative</b> of core job responsibilities with metrics that reflect results that meet expectations. Can contain a stretch element.	

Example 1

<b>Responsibility:</b> Financial management	<b>Result or outcome:</b> Reduce budget
<b>Objective:</b> Reduce departmental budget expenses by 5% with no loss of service by year end.	

Objective characteristics		Yes	No	If yes, give evidence
<b>S</b>	Is the goal specific?	✓		Reduce department budget expenses
<b>M</b>	Is the goal measurable?	✓		By 5% with no loss of service
<b>A</b>	Is the goal achievable?	✓		Based on past experience the objective provides moderate but manageable risk
<b>R</b>	Is the objective relevant?	✓		Yes, I can impact this and there is a company emphasis on managing expenses; clear link
<b>T</b>	Is the goal time-bound?	✓		By year end

Example 2

<b>Responsibility:</b> Financial management	<b>Result or outcome:</b> Reduce reporting preparation
<b>Objective:</b> Reduce reporting preparation by two days by April 30th.	

Objective characteristics		Yes	No	If yes, give evidence
<b>S</b>	Is the goal specific?	✓		Reduce reporting preparation
<b>M</b>	Is the goal measurable?	✓		By two days
<b>A</b>	Is the goal achievable?	✓		Given the new process design discussed, this can be done
<b>R</b>	Is the objective relevant?	✓		Yes, this will allow the staff to focus on other relevant tasks
<b>T</b>	Is the goal time-bound?	✓		by April 30th

Example 3

<b>Responsibility:</b> Quality assurance	<b>Result or outcome:</b> New process documented and communicated
<b>Objective:</b> Document new XYZ process and ensure all employees on each shift are aware and have signed off by the end of the first quarter.	

Objective characteristics		Yes	No	If yes, give evidence
<b>S</b>	Is the goal specific?	✓		Document new XYZ process and ensure all employees on each shift are aware
<b>M</b>	Is the goal measurable?	✓		Process documented; employees signed off
<b>A</b>	Is the goal achievable?	✓		A similar goal was achieved last year
<b>R</b>	Is the objective relevant?	✓		Yes, this will help with the quality goal of the company
<b>T</b>	Is the goal time-bound?	✓		By the end of the first quarter

# S.M.A.R.T Objectives

Write a S.M.A.R.T. objective that relates to one of the responsibilities identified in your job pie.  
(See example below)

Template

<b>Responsibility:</b>		<b>Result or outcome:</b>		
<b>Objective:</b>				
Objective characteristics		Yes	No	If yes, give evidence
<b>S</b>	Is the goal specific?			
<b>M</b>	Is the goal measurable?			
<b>A</b>	Is the goal achievable?			
<b>R</b>	Is the objective relevant?			
<b>T</b>	Is the goal time-bound?			

## Establish effective HR processes

Attracting qualified talent is a challenge for many businesses, but of equal importance is how those resources integrate within the company and perform once they are hired. We can help you implement a strong HR management process that will enhance your recruitment and retention practices, so you can attract and motivate qualified talent for your growing business.

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