



sample goals and objectives guide

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Cascading Goals

When cascading goals across the organisation there are two alignment models that are routinely used: the Top-down Functional model and the Balanced Scorecard model. While the Balanced Scorecard model is more robust and best aligns employee goals to the organisation, the Top-down has been most traditionally employed.

In the Top-down Functional model, the PRESIDENT/ CEO creates goals and then supervisors align their objectives to the CEO's goals, only changing the performance indicator. Subsequently, the process cascades down to the entire organisational structure until each individual contributes to the goals of their managers.

The Balanced Scorecard model focuses on setting the objectives for the company first, and then these objectives are broken down across the organisational hierarchy and teams. The end result is employees creating objectives that are linked to the overall organisational objectives.

In practice, most organisations have a mixture of Top-down Functional goals that transfer directly from Manager to subordinate and goals that when pieced together (Balanced Scorecard) create the circumstances for achieving a larger goal.

A Corporate Sales goal may be described as "Increase Sales by 5%" but when cascaded into three regions differing economic variables in each area may result in different growth targets, for example:

- Region A - Increase Sales by 7%
- Region B - Increase Sales by 5%
- Region C - Increase Sales by 10%

Further, to increase sales the various regions may require differing supports, for example:

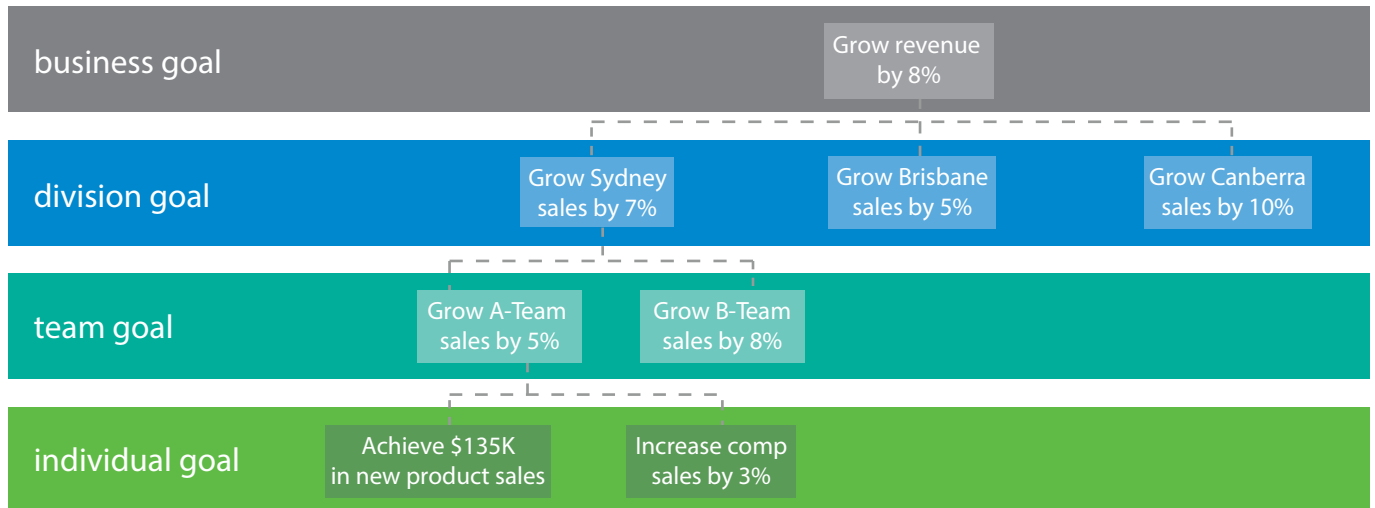
- Region A
 - Increase new product training
 - Introduction of 3 new products
- Region B
 - Increase new product training
 - Introduction of 1 new product
- Region C
 - Increase new product training
 - Introduction of 5 new products
 - Hire 1 new sales person

Each of these supports can be defined as a Goal in the Balanced Scorecard model because they have been identified as something needed to be done to achieve the larger goal of increased sales.



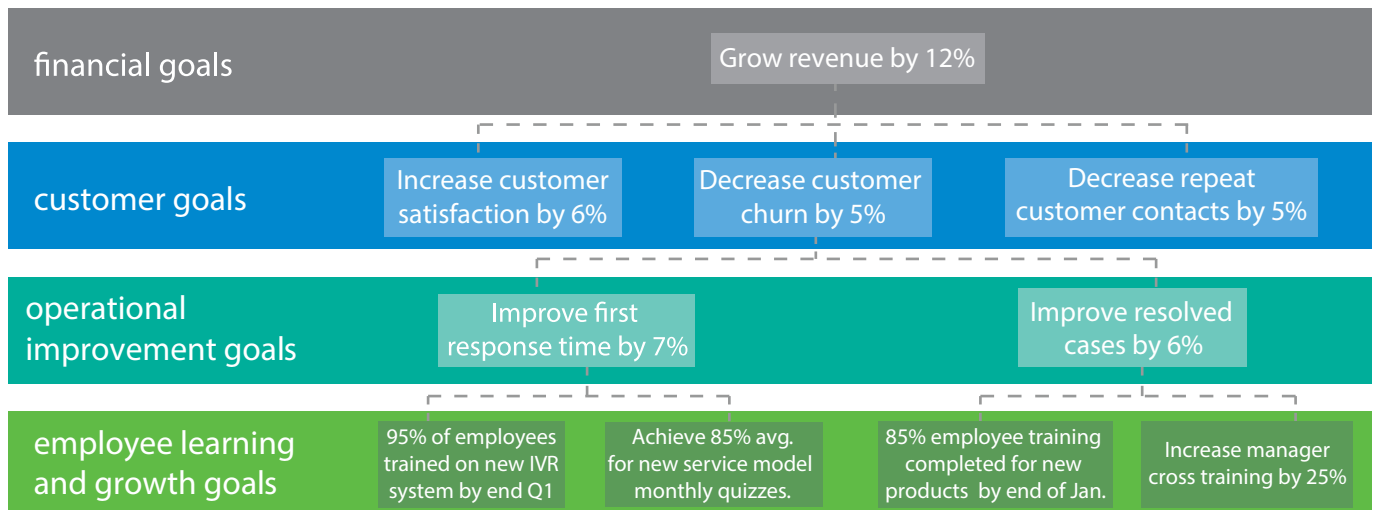
Top-down Functional Goal Cascade

Top-down cascading goals is the process of translating goals from one level of the organization to the next, like individual bricks to build a wall; ensuring alignment between the Business and individual employees' activities and goals. This sharing of the same goal helps employees and managers define expectations, and align employee goals with the broader organisational objectives. It provides an overview of each individual's expectation to meet goals and how individual division, team and personal contribution contributes to the overall business strategy – increasing transparency, making expectations clear, and engaging the workforce.



Balanced Scorecard Goal Cascade

A Balanced Scorecard approach to cascading goals takes a holistic view of a Business and coordinates goals so that leading and lagging indicators are balanced to deliver efficiencies across the business in a bottom-up fashion. The Balanced scorecard aligns business activities to the corporate vision and supports effectiveness at every level; this view of goal setting is like a puzzle where individual goals are interconnected and supportive of achieving the other.



Sample goals and objectives

Corporate Social Responsibility Department Team

Financial

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Customer

- » To increase internal customer perception of management commitment to environmental initiatives by 6% as measured in the annual employee engagement survey by the end of the fiscal year
- » To increase external customer recognition of Corporate commitment to environmental initiatives by 3% as measured through customer surveys by the end of the fiscal year

Operational Improvement

- » To increase in Percentage of materials used that are recycled input materials by 3% to an annual average of 8% by the end of the fiscal year
- » To decrease in Percentage of energy used per unit of production by 3% by the end of the fiscal year
- » To increase the amount of energy saved due to conservation and efficiency improvements by 9% each month
- » To improve 10% of Corporate owned brands packaging to be more sustainable by the end of Q#3
- » To reduce energy intensity per square foot in all corporate locations by 3% by the end of the fiscal year

Employee Learning & Growth

- » By the end of Q#1 develop and conduct a training program to support employee engagement in energy saving and conservation
- » To direct 1% of annual hours to volunteerism by the end of the fiscal year

Customer Support Team

Financial

- » To reduce Departmental operating and administrative expense dollars by 2% by the end of the fiscal year

Customer

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Operational Improvement

- » To improve First Response time by an average 15 seconds by the end of Q#1 to ensure a smooth and efficient consumer experience
- » To reduce the customer response times from the Customer Service Team from 48 hours to 24 hours, by completing process improvement activities, within this fiscal year.
- » To reduce labour cost by 25% within the next three months, by reducing the number of employee shifts from two to one.

- » To improve the rate of positive case closures by 10% on the weekly dashboard summary
- » To reduce average weekly inbound abandon rate by 5%

Employee Learning & Growth

- » To have all Service Specialists trained in Customer Self-Service selling by the end of Q#1 to increase customer success rate in Self-Service
- » To have all Service employees fully trained in Value-Add selling by the end of February 2018 to increase average order size

Facilities Management Department Team

Financial

- » To improve Return on Value-Added 4% by the end of the fiscal year
- » To reduce labour expense dollars by 2% by the end of the fiscal year
- » To reduce preventative maintenance cost by 3% while maintaining fleet uptime >97%
- » To reduce Overtime expense by 5% in Q#2

Customer

- » To provide high quality customer service resulting in a 5% increase in Client satisfaction by the end of the fiscal year

Operational Improvement

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Employee Learning & Growth

- » To have all Facilities Management employees up to date with Occupational Health & Safety certifications by the end of Q#1
- » To reduce average Injury related lost workday rate by 0.5 days per month by the end of the fiscal year
- » To have all Managers and Maintenance supervisors complete Project Management certification by the end of the fiscal year
- » To have all Managers complete Sustainability training by the end of Q#1
- » To have all Managers and Supervisors up to date on all annual Compliance training by the end of Q#2

Finance Department Team

Financial

- » To improve Earnings before interest and taxes (EBIT) by 3% by the end of the fiscal year
- » To grow gross income percent by 2% by the end of the fiscal year
- » To reduce Departmental operating and administrative expense dollars by 4% by the end of the fiscal year

Customer

- » To provide high quality customer service resulting in a 5% reduction in the number of invoices as a Percentage in dispute (per customer) each Quarter
- » To increase the Percentage of customers opting-in to electronic invoicing by 5% per month, until the organisation reaches 98% of customers invoiced electronically then maintain
- » To decrease cycle time for employee expense reimbursements by 1-day on average by the end of the fiscal year

Operational Improvement

- » To reduce the Percentage of bad debts against invoiced revenue by 4%, within this fiscal year
- » To improve Accounts Payable turnover ratio by 3% by the end of the fiscal year
- » On an ongoing basis, accurately process and publish internal Monthly Financial Statements within 7 days of the end of the month, 95% of the time
- » To reduce the number of prior period adjustments to financial statement by 4%

Employee Learning & Growth

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Human Resources Team

Financial

- » To reduce Departmental operating and administrative expense dollars by 2% by the end of the fiscal year
- » To reduce cost to hire by 5% by the end of the fiscal year

Customer

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Operational Improvement

- » To reduce the average cost per employee for customer service training by 15% by migrating to online training while increasing the number of employees trained by 20%
- » To increase the number of training hours per employee by 7% while reducing total training spend by 2% by utilizing new technologies and methods
- » To increase Off-Boarding process compliance by all departments by 12% by the end of the fiscal year
- » To decrease average time to competence by 7 days by Q#3
- » To reduce reliance on contingent workforce for summer placements by 4% average from June to the end of September

Employee Learning & Growth

- » To have HR Specialist in Employee Relations cross-train 2 HR Generalists by the end of Q#3
- » To have all HR employees fully trained in using our new HR Management software by January 2018
- » To have all Payroll & Benefits specialists fully certified by national licensing body by June 2018
- » To increase the percentage of employees with completed Performance Development plans by 15% by the end of Q#2

Information Technology Department Team

Financial

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Customer

- » To provide high quality customer service resulting in a 5% increase in Service Desk satisfaction each Quarter

Operational Improvement

- » To decrease Service Desk Average Time to Resolved by 6% by the end of the fiscal year
- » To improve Percentage of IT managed servers patched at deadline by 2% by the end of the fiscal year
- » To develop a quality improvement process for the Data analysis system, which reduces the failure rate to 1% by 20th December 2019
- » To decrease the average handle time for IT Support calls by 5% by the end of Q#1
- » To increase the average weekly number of calls per Helpdesk employee by 9% while maintaining average weekly Helpdesk satisfaction rating over 96%

Employee Learning & Growth

- » To have all Service Desk employees complete Active Directory certification by the end of Q#1
- » To reduce IT employee turn over by 5% by the end of the fiscal year
- » To increase the percentage of IT support staff that are Microsoft certified by 8% by the end of Q#2

Logistics Team

Financial

- » To reduce Inventory expense dollars by 2% by the end of the fiscal year
- » To reduce total logistics cost by 3% while maintaining weekly average in-stock position over 98% by the end of Q#2
- » To reduce total inventory cost by 4% while maintaining weekly average in-stock position over 98% by the end of Q#2
- » To reduce total stock loss due to damage by 3% by the end of the fiscal year

Customer

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Operational Improvement

- » To improve Inventory expense ratios as a percent of sales by 2% by the end of the fiscal year
- » To improve Inventory Turns by 2% by the end of the fiscal year
- » To improve in-stock percentage by 2% to monthly average 96% by the end of the fiscal year
- » To improve On-time delivery by 5% by the end of the fiscal year
- » To reduce the cost per kilogram transported by 1% by the end of the fiscal year
- » To reduce the cycle time from dock to stock by 3% by the end of Q#1

Employee Learning & Growth

- » By Q#3 help develop and participate in cross training for the forklift operators to learn procedures required for warehouse receiving function
- » To develop a quality improvement process for the inventory team that reduces product breakage to 1% by Q#2
- » To increase the percentage of Logistics Managers with Supply Chain Certificates from accredited institutions by 25% by the end of Q#3

Marketing Team

Financial

- » To grow ad revenue by 2% by the end of the fiscal year
- » To improve Return on Marketing investment (ROMI) by 3% by the end of the fiscal year

Customer

- » To increase the Customer awareness of new product by 35% by the end of Q#2
- » To increase Q-Score by 5% by the end of the fiscal year
- » To double website's traffic within the next 12 months, by providing top quality content and solutions to consumers
- » To increase Social Media Reach by 2% month-over-month for 2018
- » To increase organic Blog post visits by 5% each month for 2018

Operational Improvement

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Employee Learning & Growth

- » To have all Digital Marketing Specialists complete approved coursework in Advanced Google Analytics and achieve 95% on the exit exam by the end of Q#1
- » To have all marketing employees complete approved Online Marketing Foundations coursework and achieve 95% on the exit exam by the end of Q#2

Occupational Health & Safety (OH&S) Department Team

Financial

- » To reduce Medical Aid claims cost by 15% by the end of the fiscal year
- » To reduce Lost Time claims cost by 12% by the end of the fiscal year
- » To reduce Workers Claims cost by 9% by the end of the fiscal year

Customer

- » To increase employee perception of management commitment to a safe & healthy workplace by 5% as measured in the annual employee engagement survey by the end of the fiscal year
- » To decrease the percentage of issues rose by OH&S Reps by 8% by the end of the fiscal year

Operational Improvement

- » To decrease Accidents per 100 employees by 10% each Quarter
- » To decrease the number of non-conformance with legal or internal standards in safety inspections by 5% each month
- » To increase in Percentage of occupational health and safety (OHS) committee recommendations implemented by 3% to an annual average of 98% by the end of the fiscal year

Employee Learning & Growth

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Sales Team

Financial

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Customer

- » To enter 2 new markets, by the end of this fiscal year
- » To increase the annual guest arrivals by 20% by the end of Q#2
- » To make 5 referral sales totalling \$500,000 in revenue in 2016
- » To double website's affiliate revenue within the next 12 months, by providing top quality content and solutions to partners.

Operational Improvement

- » To increase Lead-to-Sales conversion rate by 5% by the end of the fiscal year
- » To decrease Cost-per-Lead by 10% while increasing Lead-to-Sales
- » To increase average Customer Lifetime Profitability by 7% by the end of the fiscal year
- » To reduce customer attrition rate by 5% by the end of the fiscal year
- » To reduce average conversion time by 10% by Q#1

Employee Learning & Growth

- » To have all sales associates trained on new products and achieve 95% on the Product knowledge test by the end of Q#1

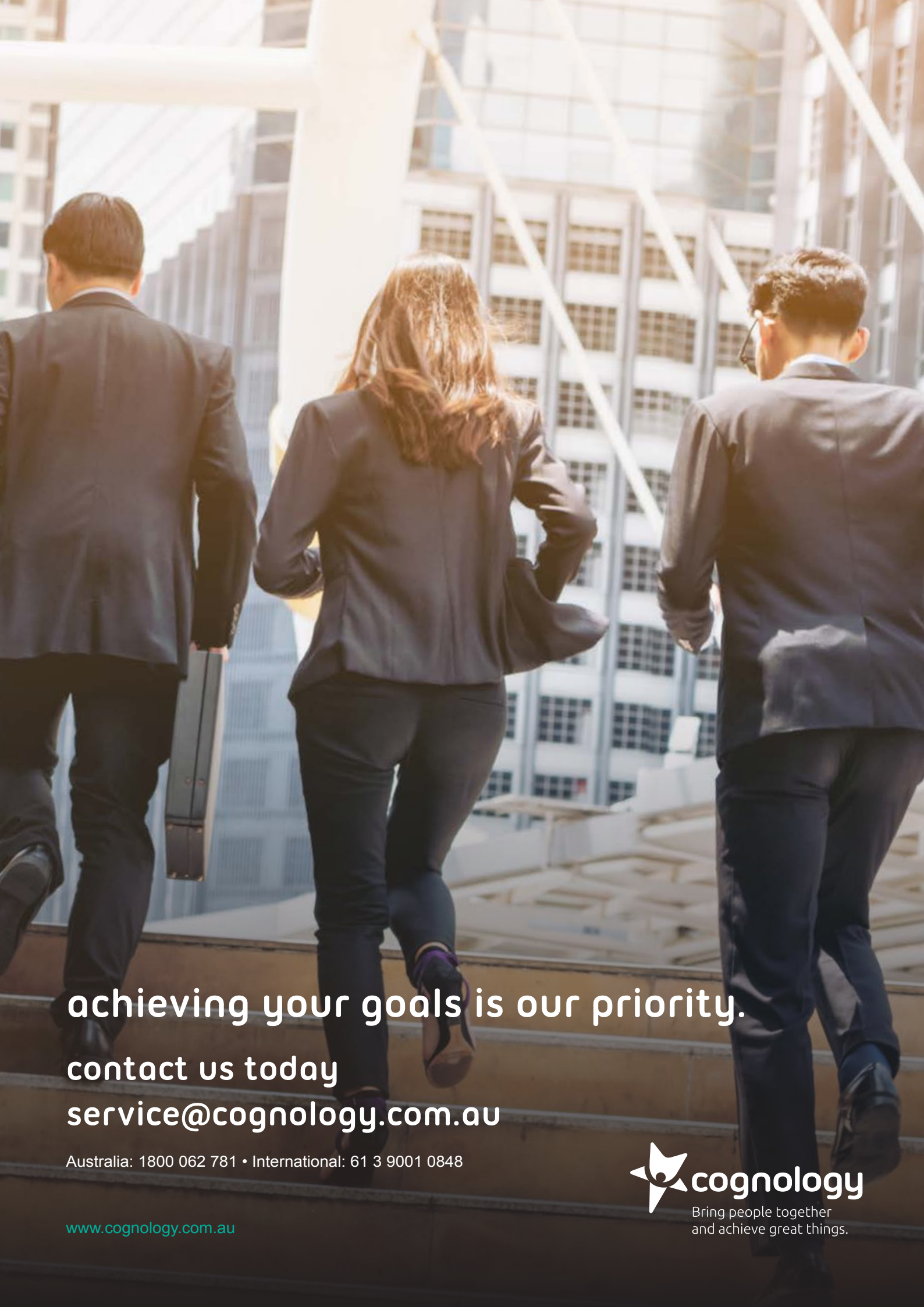
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