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## How to Set and Achieve Your Goals

PRESENTED BY



THURSDAY, JULY 22  
12:00 - 1:00 PM





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How We Communicate Matters

PRESENTED BY Ahern, Murphy & Associates Agency of Change THURSDAY, SEPTEMBER 16 12:00 - 1:00 PM

October 12 – BN360 Racial Healing Circle

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Racial Healing Circle

TUESDAY, OCT 12 | 8:30 - 9:30 AM

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# Q&A / Survey

- Throughout today's presentation, please submit any questions through the **chat** or **Q&A** feature
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# Introducing



Presenter: **Mike Cardus**



# Goal Setting and Time Span

## Goal Setting & Time Span

### Overview

The essence of management is goal-directed behavior. The underpinning of everything an organization does can be traced back to a goal.

Goals create **definition, clarity and self-evaluation.**

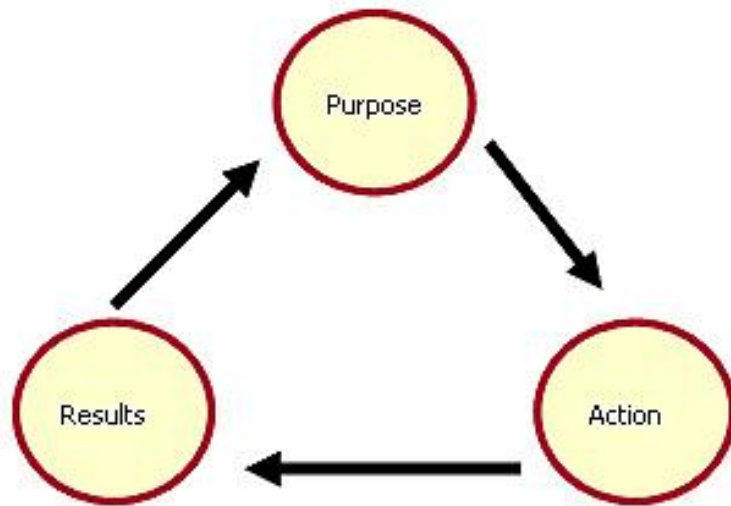


## **Learning Objectives**

- Understand the two elements of a goal.
- Understand the importance of time span.
- Understand the relationship between goals and time management.
- Understand prescribed elements vs discretionary elements of a goal...

## Goal Directed Behavior

- Everything a company does can be traced back to its goals.
- Every task, every operation, every resource, every supporting service, everything can be expressed in terms of a goal.
- And every element of the company exists only because it is **necessary** in the pursuit of a goal...



Goals define **purpose**.

Goals define **action**.

Goals define **results**.

**And nothing else matters.**

*But what about culture? What about values?*

- Culture is meaningless.
- Values are meaningless.
- Except as they support our goals.

As they do support our goals, culture and values are powerful.

**Everything a company does can be traced back to its goals.**

## What by When?

What is a **Goal**?

In its simplest form, a **Goal** is a "**what by when.**"

There are many other more complicated definitions, but it all boils down to a "**what by when.**"

In football, a **goal** is a score (**what**) that occurs before the end of the game (**by when**)...

# Dimension of Time

## What by When's

Everything we do, as a person, is goal directed behavior. Our daily lives are filled with "**what by when's.**" Sometimes we are aware of our goals, sometimes our goals are so routine that we don't even notice. Yet our days are full of goals. Some goals are noble, some not so noble. Some goals are driven by needs, some driven by desire, some driven by avoidance.

And there are times, plenty of times, when we are most definitely *aware* of our goals. We think about them, share them with others, change them, write them down and achieve them.

And when we consider our goals, we are most *aware* of the "**what,**" yet seldom pay attention to the "**by when.**"...

## By When

But it is the "**by when**" that carries the impact so elusive to most managers.

The "**what**" of the "**what by when**" tell us *what* to do, but the "**by when**" governs the actual timing of the action, the pace of the action, the urgency of the action, the ultimate quality of the action, the priority of the action and in many cases, whether the action occurs at all..

An even deeper look at the "**by when**" reveals the complexity of a goal.

A goal due by tomorrow is likely to be *less* complex than a goal which requires three months to complete.

This "**by when**" or **Time Span** of a goal holds the deepest secrets for the manager.

The **Time Span** of a goal allows for *more* or *less* uncertainty to creep into the outcome. The capacity of a person to deal with *more* or *less* uncertainty will govern who we, as managers, choose to delegate to...



## **Time Span**

This dimension of time is powerful.

The **Time Span** of a goal helps us understand its complexity and the people we choose to achieve that goal

## Goals and Time Management

There are many principles of Time Management:

- Prioritization
- Elimination
- Block Time
- Automation
- Checklists

Making a list, checking it twice.

- A** Important Stuff
- B** Stuff that can wait till tomorrow
- C** End of the week

But these principles are only effective when they are driven by goals (**what by when**).

And the **what** gives us scant information...

It is the **by when** that tells us

- What is best sequence of tasks (**Prioritization**)
- What is necessary (what to **Eliminate**)
- The complexity which requires uninterrupted focus (**Block Time**)
- If we have time to automate repeated tasks (**Automation**)
- If we have to get it right the first time or if we always have time to do it over (**Checklists**)...

When I work with someone on issues related to Time Management, we almost always start with their **goals**. And it is the **by when** that drives our decisions.

# Prescribed Elements vs Discretionary Elements

Every goal, a "**what by when**," is surrounded by **prescribed** elements and **discretionary** elements.

## Prescribed Elements

The "**what**" of the "**what by when**" describes the **prescribed** elements of the goal. These are the Performance Standards, non-negotiable. These Performance Standards are often defined by someone else, your boss, an engineer or a board of directors. There is no discretion around these elements, no decisions have to be made.

## Discretionary Elements

The "**by when**" of the "**what by when**" drives the **discretionary** decisions surrounding the goal. Most discretionary decisions are about **pace** and **quality**.

# What is Work

What do we pay people for?

Take a CNC operator, cutting metal in a machine on a factory floor. As a company, what do we pay this person for?

The operator puts a piece of metal in the machine, pushes a button and removes the metal (now cut).

Do we pay the operator to push the button?...

**Of course not.** We could get a robot to do that. We pay the operator for the **discretionary decisions surrounding the goal.**

- How much raw metal should I stack in front of my machine for the day's work?
- What mix (size) of metal should I pull from inventory?
- Is the noise from the machine normal or abnormal, should I call a maintenance engineer?
- As the sheets are cut from the machine, should I stack them or move each piece to the next area as soon as it is cut?
- How long should I allow scrap metal to build up behind the machine before I sweep and discard?
- Do the cut sheets require deburring before the next step?
- Do the cut sheets meet the Performance Standard for size?
- Do I have to work faster to meet the Quantity Standard for today's production?

Even something as routine as metal cutting requires **discretionary** decisions. Those decisions are almost always related to **pace** and **quality**.

# Creating Effective Goal Statements

We carry goals in our head all the time.

And there are many reasons to write them down.

- To clarify goals to ourselves.
- To clarify goals to other people.
- To help make decisions about the importance of one goal over another.
- To help understand the complexity of a goal...



But if we get sloppy when we write, a goal statement won't help us.

## Elements of an Effective Goal Statement

Fundamentally, a goal is a **what by when?**

What elements need to be included when we write a goal statement?

### QQTR?

- What is the **Quantity**?
- What is the **Quality**?
- What is the **Time** frame? (Time Span)
- What are the **Resources** available?...

# QQTR

If your goal statement answers these questions, it is likely to be an effective statement. If you miss one of these (QQTR), then you know what to fix.

Example:

**Goal** - *Complete the project for my client.*

Effective? - **No.**

**Goal** - *Prior to Friday at 3:00p, publish the four project sections, specifically responding to the five criteria outlined by our client, using the research provided.*

Effective? - **Yes.**

# Self-Completed vs Delegated Goals

As time goes by, you will receive, from *your* manager, many task assignments (goals). Some of those tasks must be completed by you and others can be delegated.

**How do you decide which to keep and which to delegate?**

## Time Span

Time Span is the secret. The "**by when**" gives us insight to the complexity of any goal. The shorter the Time Span, the *less* complex, the longer the Time Span, the *more* complex. It is all a matter of **uncertainty**. The longer the Time Span of any goal, the more likely **uncertainty** will enter the picture.

## What to Keep

Goals with a longer Time Span, with *more* complexity (uncertainty), are the ones you have to keep.

## What to Delegate

Goals with a shorter Time Span, with *less* complexity (uncertainty), are the ones you may delegate.

## With Precision

While this makes common sense, there is a science to all of this. Some people are capable of dealing with *more* or *less* complexity. This complexity can be measured in Time Span...

***Only delegate tasks to those people with the capability to complete tasks of that Time Span.***

Only delegate **one-week** (Time Span) tasks to those people with the capability to complete tasks with a **one-week** Time Span.

Only delegate **one-month** (Time Span) tasks to those people with the capability to complete tasks with a **one-month** Time Span.

Only delegate **three-month** (Time Span) tasks to those people with the capability to complete tasks with a **three-month** Time Span...

# The Action Plan

## Who Creates the Action Plan?

Micro-managers want to control everything. And that's where the trouble begins.

## What's in the Action Plan?

The Action Plan contains the major **discretionary** decisions related to the goal. Most **discretionary** decisions are about **pace** and **quality**. The Action Plan will contain the details about:

- Sequence?
- How fast?
- When to apply resources?
- How much of a resource to use?
- Organization of elements and resources?...

## So, Who Creates the Action Plan?

If the Action Plan contains the major **discretionary** decisions related to the goal, then the Action Plan should be created by the person who has the **discretion**.

For those task assignments (goals), given to you by your manager, you have to decide which to keep and which to delegate.

For those you keep, **you** create the Action Plan.  
For those you delegate, the **Team Member** creates the Action Plan...

# Follow-up

Follow-up is where most managers drop the ball.

## Evidence

For follow-up to be effective, there has to be evidence.

- Published report
- Checklist (checked off and signed)
- A Meeting (minutes)

## Time

For follow-up to be effective, there has to be an appointed time to examine the evidence. The best time to establish the follow-up appointment is when the Goal Statement is created.

**Goal** - *Prior to Friday at 3:00p, publish the four project sections, specifically responding to the five criteria outlined by our client, using the research provided. For follow-up, the published report will be emailed to my manager for review prior to Friday at 3:00p*

# Goals (what-by-when) Established for teams

<b>What</b>	YES	<ul style="list-style-type: none"> <li>• Missed deadlines.</li> <li>• Wasted time on irrelevant pieces of the work.</li> <li>• Below quality completion</li> <li>• Frustration due to repeated work processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Team coordination of task completion dates.</li> <li>• Explicit assumptions of who is doing what-by-when.</li> <li>• Team-work happens, with little intervention from management.</li> </ul>
	NO	<ul style="list-style-type: none"> <li>• Apathy amongst the team.</li> <li>• Dis-trust of management and each other.</li> <li>• Irrelevant competition for resources.</li> </ul>	<ul style="list-style-type: none"> <li>• Frustration due to people operating off their own agenda.</li> <li>• Management consistently changes expectations.</li> <li>• Insufficient resources.</li> </ul>
		NO	YES
		<b>by-When</b>	





## **Field Work Assignment** *Questions to answer on the next page.*

1. Meet with your Manager to discuss those goals related to your role in the company. As part of this meeting, make sure to discuss the Time Span related to each of your goals. It is likely that some of your goals must be completed within one year, some within six months, three months, one month. Some project goals may have shorter Time Spans.
2. Create a written Goal Statement for each Goal including QQTR (Quantity, Quality, Time, Resources).
3. Determine which goals must be self-completed and which goals may be delegated, based on Time Span.
4. For those goals which must be self-completed, create a short Action Plan.
5. For those goals which must be delegated, create a short Follow-up Appointment.

# Goal Setting Discussion Questions.

*This **Field Work** should be completed . Once you complete the field work email it to mike (at) create-learning.com in a word document. I will read over it and provide coaching and feedback to your goals.*

1. **Number 1 Goal** - Related to the Goals assigned to you that must be self-completed, select the top Goal with the longest Time Span. State this longest Time Span Goal in terms of QQTR. Describe a brief Action Plan.
2. **Number 2 Goal** - For those Goals assigned to you that must be self-completed, select the next Goal and state it in terms of QQTR.
3. **Number 3 Goal** - For those Goals assigned to you that must be self-completed, select the next Goal and state it in terms of QQTR.
4. **Delegated Goal 1** - For those goals which can be delegated, state the longest Time Span Goal in terms of QQTR, why it can be effectively delegated and to whom?
5. **Delegated Goal 2** - State the Goal in terms of QQTR, why it can be effectively delegated and to whom?
6. **Delegated Goal 3** - State the Goal in terms of QQTR, why it can be effectively delegated and to whom?
7. Based on your experience with this exercise, what do you recommend to other participants in this process?

## **Sample Report.**

*I have added the overall role – just to set the stage for the sample*

### **What is your overall role in your organization? Include your title and primary accountabilities?**

I am the Human Resources Director and mainly act in a consultant like role. I am also over training so all new hire and soft skills training is part of my area. I oversee the administration of employment including recruitment, Affirmative Action, interviewing, drug testing, hiring, and the separation process to include approving and coordinating last chance agreements. Ensure proper maintenance of employee files and other HR records. Ensure compliance with Federal and State regulatory postings. Oversee and direct local implementation and compliance of all personnel, compensation, and benefit programs (e.g., annual merit, performance evaluation, and unemployment insurance). Make sure that employees stay in compliance of the training requirements set by Blood Systems, Inc., which is the parent company.

**Number 1 Goal - Related to the Goals assigned to you that must be self-completed, select the top Goal with the longest Time Span. State this longest Time Span Goal in terms of QQTR. Describe a brief Action Plan.**

Follow-up with management team on the UBS 2020 Action plan, by reporting on a monthly basis the progress towards the goals starting March 2020 and ending Jan. 2021.

I will send out the finalized action plan to remind the group what the action items were. Meet with at least 2 directors in March to see how they are progressing and see if they need my assistance in any way. I will add an item to my weekly report that will address the progress towards completion of the action items identified in the plan.

**Number 2 Goal - For those Goals assigned to you that must be self-completed, select the next Goal and state it in terms of QQTR.**

Provide training to 75% of supervisor's conducting interviews on the hiring process and best practices through 1 to 2 hour trainings by June 1. The resources needed for this are the handouts, 2 to 4 hours of my time, and space to conduct the training.

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**Number 3 Goal - For those Goals assigned to you that must be self-completed, select the next Goal and state it in terms of QQTR.**

I will visit the 3 remote locations at a minimum of one time per quarter to provide information about United Blood Services benefits and answer questions about our insurance through group and individual meetings by Dec. 31. I will need a car, room to stay the night, 2 days of my time, training materials, and will use the remote location lunchroom to conduct the informational meetings.

**Delegated Goal 1 - For those goals which can be delegated, state the longest Time Span Goal in terms of QQTR, why it can be effectively delegated and to whom?**

Provide 15 one hour trainings on soft skills to improve front line supervision and complete the 8 hours of required supervisor training by Dec 31, 2020. Majority will be delegated to Shawn Riley, Training Specialist, because he has a great repor with the employees and has the skills needed to conduct the training. I have provided him access to many audio/web conferences and he will attend training on the topic provided by a third party vendor to expand his knowledge of different areas as needed, so he can train our staff in a condensed version. I will be available to attend the trainings for topics that he is not experienced in so correct information will be trained.

**Delegated Goal 2 - State the Goal in terms of QQTR, why it can be effectively delegated and to whom?**

Enter all training credits for supervisors on the L:drive on a monthly basis for the entire year so departments can ensure all supervisors meet the 8 hour requirement. It can be delegated to Shawn because it is within the scope of his position; he receives the forms and has access to the electronic file to make changes as needed.

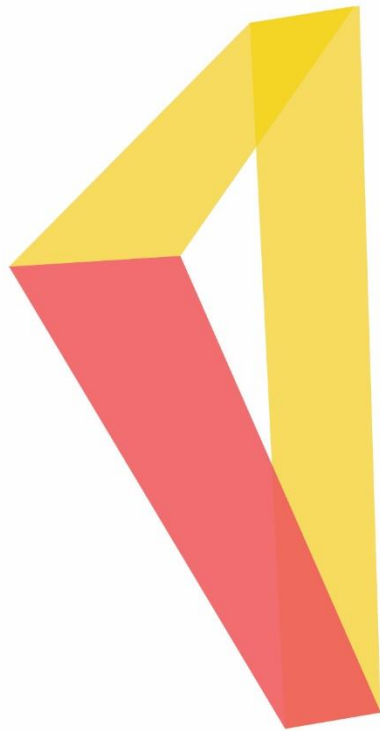
**Delegated Goal 3 - State the Goal in terms of QQTR, why it can be effectively delegated and to whom?**

Audit all 185 employee employment files for required documents by April 1. This is delegated to Marcella, Administration Assistant, because she is detail oriented and knowledgeable of the documents contained within the file. She has many years of experience in organizing paper documents and using the internal document control source, EDMS.

**Based on your experience with this exercise, what do you recommend to other participants in this online program?**

Be willing to look at your goals and make edits because there are a lot of goals that come to mind when you are completing this exercise. I have realized that goals with a time span of multiple years are more difficult to document using the QQTR method because you don't always have the details all figured out 2 years in advance.





Organization  
Development by

**MIKE  
CARDUS**