

GOAL SETTING

Participant Workbook

Do not duplicate
SAMPLE

Susan Fowler

Drea Zigarmi

Ken Blanchard

GOAL SETTING
PARTICIPANT WORKBOOK

Authors

Susan Fowler
Drea Zigarmi
Ken Blanchard

Product Developer

Kim King

Art Director

Beverly Haney

Production Artists

Kara Meredith
Kim King
Vanessa Gagos

Project Manager

Kim King

Proofreaders

Carey Nash
Linda Hulst
D'Andra La Pierre

Brand Manager

Victoria Cutler

Ken Blanchard first developed Situational Leadership® with Paul Hersey in the late 1960s. In 1985, Blanchard and the Founding Associates of The Ken Blanchard Companies®—Marjorie Blanchard, Don Carew, Eunice Parisi-Carew, Fred Finch, Laurence Hawkins, Drea Zigarmi, and Patricia Zigarmi—created a new generation of the theory called Situational Leadership® II. The leadership model used in this product is based on the Founding Associates' second generation thinking and research, and is used with their permission.

Situational Leadership® is a registered trademark of Leadership Studies, Inc.

© Copyright 2012 by The Ken Blanchard Companies. All rights reserved. Do not duplicate.

These materials have been designed to develop specific knowledge and skills and have been thoroughly tested to ensure their effectiveness. They represent the proprietary intellectual property of The Ken Blanchard Companies® and are protected under international copyright law. These materials may not be reproduced in whole or in part in any form without the prior written permission of The Ken Blanchard Companies.

Environmental Statement



The Ken Blanchard Companies strives to conserve natural resources by minimizing consumption of resources and energy, reducing emissions, and increasing awareness so that future generations will inherit a healthy, sustainable planet.

Ken^{THE}**Blanchard**
COMPANIES

Global Headquarters USA +1 760 489-5005 • 800 728-6000 • Fax +1 760 489-8407
UK +44 (0) 1483 456300 **Canada** +1 905 829-3510 • 800 665-5023 **Singapore** +65 6775 1030
www.kenblanchard.com



Table of Contents

Preface	v
Goal Setting Challenge	1
Consider This	2
Learning Objectives.....	3
KRA, Goal, and Task Statement Sort—Part 1	4
KRA, Goal, and Task Statement Sort—Part 2	7
Maria Hernandez Case Study	8
About Maria.....	9
Definitions.....	10
League Stats.....	11
Maria’s Baseball Card	12
SMART Goals	13
SMART Goal Skill Practice	14
Extra Credit	16
Action Planning.....	17
Key Learnings.....	18
Ideas, Insights, and Intentions	19
KRA, Goal, and Task Statement Sort—Part 1 Answer Key	A-1
KRA, Goal, and Task Statement Sort—Part 2 Answer Key	A-2



Preface

Think about this: Goal setting unleashes the hope of opportunity and the power of action. So, why is it that more of us aren't more excited about setting goals? In this workshop, you will be asked to consider the obstacles to goal setting—and there are many—not the least of which is that most people do not know how to set meaningful, effective goals. You will also be asked to consider the benefits of goal setting—and there are many. Learning the skill of goal setting will take you a long way to embracing the practice, but our hope is that you will come to recognize and appreciate how the benefits of goal setting outweigh the obstacles.

As you experience this workshop, it is important to acknowledge that goal setting is an iterative process—not an exact science. This means that it takes work. You might find yourself taking a goal statement and tweaking it multiple times until it clearly defines your desired outcome. We ask that you trust the process. Your hard work will pay off. Remember the benefits of goal setting that you identify early on in the session; you will discover more along the way.

If you think goal setting might be boring, grueling, and/or painful—our intent is to change your mind. Capturing dreams and crafting them into reality is stimulating and rewarding—whether they are your own dreams, those of a direct report, a team, or an organization. We hope to prove this to you in this workshop.

*Susan Fowler
Drea Zigarmi
Ken Blanchard*



Goal Setting Challenge

Think about either ...

- a current goal that has you demotivated, or
- a new professional or personal goal you would like to achieve over the next six months.

Record your goal in the space provided.

If time permits, share your thoughts with a tablemate.

Current Goal

New Goal



Consider This ...

1. What is the problem with goal setting?

- Why don't most leaders set effective goals?

- Why do people find goal setting so difficult?

- What are some of the obstacles to effective goal setting?

2. What are the benefits of goal setting?

From the following three perspectives:

- Individual or self-leader

- Leader of others

- Organization



Learning Objectives

Purpose

To learn how to set meaningful goals that increase productivity, sustain motivation, and provide the foundation for inspired leadership of self and others

Outcomes

Check the outcomes that are important or relevant to you. At the end of this workshop, you will ...

- 1. Understand the difference between a key responsibility area, a goal, and a task statement
- 2. Feel confident to write goal statements using the fundamentals of SMART goal setting
- 3. Value the role SMART goals play in sustaining motivation, and increasing energy, vitality, and a sense of well-being
- 4. Appreciate the importance of goals as a tool for developing others
- 5. Facilitate another in writing his or her SMART goal



KRA, Goal, and Task Statement Sort— Part 1

Read each statement. Determine if it is a KRA, a goal, or a task statement. Write the letter of the statement in the appropriate column to the right. The answer to the first statement is shown as an example. Refer to your Handbook for helpful definitions.

	STATEMENT	KRA	GOAL	TASK
A	To plan, monitor, and update sales forecasts in order to advise the marketing, inventory, and purchasing departments of upcoming resource requirements	A		
B	To recruit, train, and evaluate sales representatives in order to increase sales representatives' competence and commitment to XYZ Company			
C	To train five to six new sales representatives on product features, advantages, and benefits of four of the six company product lines by X date			
D	To proof and edit the sales knowledge tests by comparing test questions to the product specs manual by X date			
E	To schedule product knowledge training for all sales representatives by booking the hotels and sending invitation letters to representatives by X date			
F	To promote, solicit, and close on all company products and services in order to maintain and increase corporate revenue			

	STATEMENT	KRA	GOAL	TASK
G	To make at least seven sales calls a day by phone, five days a week, for the next two months, by scanning the business directory for leads			
H	To increase widget sales volume by 3.8–4.2% in the next 12 months while maintaining X% profit before taxes			
I	To prepare a list of 500 prospects in Chicago industrial areas for the purpose of mailing pre-approach letters by February 1 of next year			
J	To secure at least one different face-to-face client interview per week for the next 12 weeks by scanning the business directory for possible leads			
K	To improve the reliability of the machines by reviewing the maintenance schedules and updating preventative maintenance requests within 30 days			
L	To conduct 90–95% of all required preventative maintenance requests within 18–24 hours of schedule in a 12-month period			
M	To plan, schedule, and direct the production activities of the cell room (manufacturing unit) in order to meet the product demands of the sales representatives			

KRA, Goal, and Task Statement Sort—Part 1

	STATEMENT	KRA	GOAL	TASK
N	To produce 330–345 tons of caustic acid at 51.0–49.0 strength levels and 100 PPM Salt, 326–336 days per year			
O	To reduce my body weight to 182 pounds or less by March 3 of next year			
P	To exercise three to four times a week in the next six months (at least 72–96 days out of 180)			
Q	To obtain a health membership within X days by getting prices from three health clubs To find two other people to exercise with by X date To locate running routes that are one, two, and three miles long, measuring possible areas by car, by X date			
R	To plan, implement, and monitor a set of personal strategies to stay physically fit in order to live longer and to experience life more fully			
S	To analyze the next month’s calorie intake for meals by comparing food eaten against a calorie chart			
T	To reduce maintenance costs over time to 18.5–19.0% in the next 12 months			



KRA, Goal, and Task Statement Sort— Part 2

Each of the 20 statements from Part 1 can be further sorted into four topic groups or categories (Production, Health, Sales, or Sales Training). Reread the statements and write the letter of the statement in the appropriate row and column.

TOPIC GROUP	KRA	GOAL	TASK
PRODUCTION			
HEALTH			
SALES			
SALES TRAINING			



Maria Hernandez Case Study

▶▶▶
After reading the case study, use the information on pages 9–12 to help you write a SMART goal for Maria on page 13.

You are the manager for the major league Titans baseball team. You're in your third year as manager, and last year your team placed third in the pennant race because of a lack of runs in crucial games. Your pitching looks stronger this year than last, and you have had a good preseason record. You and your coaching staff must meet with each team member to finalize goals for the upcoming season, which starts in a week.

You are about to meet with your new catcher, Maria Hernandez. She was recently acquired in the free-agent draft because your catcher from last year suffered a career-ending injury. You have talked to Maria frequently during the preseason about getting to know the pitchers she will be working with, and you have observed how she handles the staff during practices and preseason games.

You must formulate some goals for Maria before your discussion with her in two days. The incentive clause in Maria's contract has yet to be written, but must be done before opening day. You have collected all the league stats and background information about Maria to help you determine appropriate goals.

You have decided that you will have specific goals for all players in three areas:

1. Offense
2. Defense
3. Being a Team Player

Your challenge is to write an Achieves • Outcome • When goal statement for Maria in the key responsibility area of defense, then make sure it is SMART.



About Maria

- Twenty-six-year-old Maria is in her sixth year as a player.
- She was let go by her former ball club because they picked up another catcher.
- Maria had a run-in with the manager of her previous team.
- Maria understands the English language, but has difficulty speaking it.
- She is a loner by nature.
- Maria did not have a good season last year.
- She has not been injured seriously while she has played in the major leagues.
- Maria has had a habit of talking to the press about her teammates rather than directly confronting them, and has even gotten into a couple of locker-room spats with those around her.
- She doesn't like to lose.
- She didn't like it when her team finished last in their division the previous year.



Definitions

Use the following definitions to help understand the data provided in the League Stats and on Maria's Baseball Card on pages 11 and 12.

- **Batting Average** refers to the number of safely hit balls by a player divided by the number of opportunities at bat. If a player had 25 hits at 100 times at bat, his or her batting average would be .250.
- **RBIs** refers to the number of runs batted in by the batter as a result of a ball hit into the field of play.
- **Stolen Base Percentage** refers to the percentage of time the opposing team players have stolen a base against your team because your catcher didn't prevent it. This defensive stat refers to the team's catcher and shouldn't be confused with Stolen Base Percentages of batters.
- **Passed Balls** refers to the number of balls thrown by the pitcher that got past the catcher while a batter was at the plate—in other words, pitches the catcher didn't catch (but should have) and the batter didn't hit.