



The Ohio State University

# Goal Setting Conversation

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THE OHIO STATE UNIVERSITY  
HUMAN RESOURCES

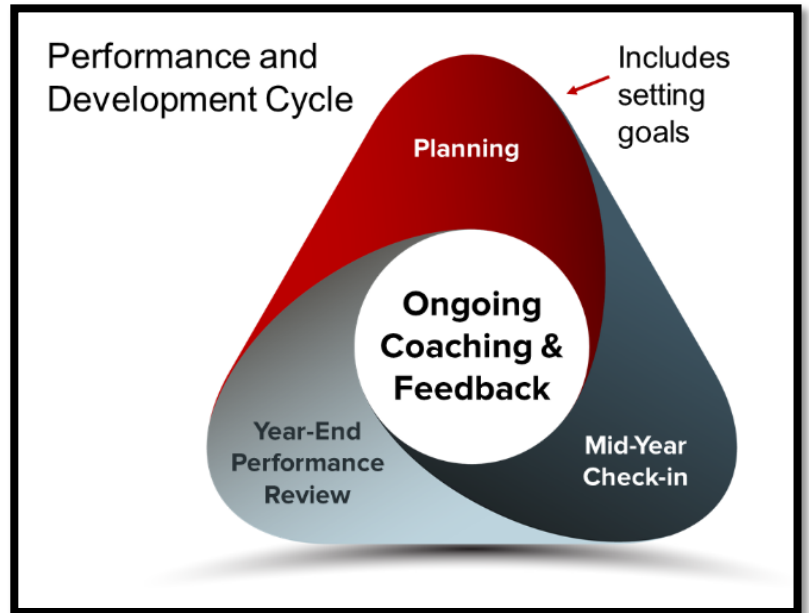
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# Goal Setting Conversation

Setting goals can be a way to think positively, purposefully, and productively about the future. Just as performance on goals is central to the annual review process, setting goals is fundamental to planning for the coming year. As a manager, it is important to develop clear goals that you and your employee understand and agree on, and to discuss how they will meet the goals. This could involve using particular tools or resources, developing new skills, or increasing knowledge.

Here you will find reminders and resources for the goal setting or planning portion of our Performance and Development Cycle (Performance Management). Ongoing conversations are an important component of this Performance and Development Cycle to ensure your employees have the support required to meet their goals.



## General Guidance

Goals should combine what is of interest to the employee with what is important to the university, unit and/or work group. As a manager, it is important to share your goals with your team, which ideally align with your college or unit goals. It is powerful and effective if every team member is working toward the same college or unit goals; however, the contribution or individual goals aligning to those overarching goals could be different for each employee. The goals should also stretch the employee a bit – not so much they cannot achieve them, but more than business-as-usual. It is critical that employees fully understand the goals they set with their manager and how the goals align with the organization’s goals. Use the [SMART framework](#) to help define clear and inspiring goals.

## Types of Goals

When setting goals, consider these 3 things: *employee performance*, *employee development* and *business objectives*. Ideally a goal blends two or more of these. For instance:

- A goal might be performance-oriented and also advance a business objective.
- A performance goal might require the employee to develop a skill or competency development or increase their knowledge.
- An employee development goal might reflect a longer term career aspiration and also align with current business needs.



## Number of Goals

Aim for 2 to 4 carefully chosen and described goals. Having 5 or 6 goals is often unrealistic and contributes to a fragmented focus for the employee and their manager.

## Setting Goals Virtually

Our move to remote and virtual work has made some conversations and work easier and other work harder. Be flexible and compassionate (with yourself and the other person!) as you work through the goal-setting process. Be willing to set and refine goals over several conversations if necessary.

Preparing for this two-way conversation is key to getting the most out of it. If you are the manager, consider what information you could share in advance, such as business objectives or strategies. Afterwards, follow up to ensure both of you are clear on what was agreed to and recorded as goals.

Refer to *Delivering Performance Reviews Virtually* in Resources for more information.

# Resources

## For Managers

1. [Conversations of Performance Management](#) on BuckeyeLearn includes brief videos and valuable tip sheets for each of the four essential performance management conversations: Plan, Develop, Feedback and Review. Highly recommended for all managers.

### To go directly to the 10-minute video and 3 tip sheets on goal setting:

- Access the [course](#), click the **Open Curriculum** button and click on the **Plan** module.
2. [Gateway to Learning Resources on Goal Setting](#): Click links to recommendations on **Development Conversations** and **Questions to Ask**.
  3. [Delivering Performance Reviews Virtually](#) (4 pages) provides guidance for having performance reviews virtually when much of your time with your employee (or manager) was previously in-person.

## For Employees

1. [Gateway to Learning Resources on Goal Setting](#)
2. [Gateway to Learning Resources on Career Planning and Development](#)
3. [Delivering Performance Reviews Virtually](#) (4 pages) provides guidance for having performance reviews virtually when much of your time with your employee (or manager) was previously in-person.