AN E.P.I.C. SOLUTION TO NON-PROFIT UNDERSTAFFING:

4 ACTION ITEMS THAT WILL HELP YOUR NONPROFIT TEAM OVER-DELIVER

NAPHTALI HOFF, PSYD

UNDERSTAFFING:
A COMMON PROBLEM

A painfully familiar reality for non-profit and educational leaders is understaffing.

My clients complain about it all the time.

"I don't have enough people on staff to get our work done."

"If I had better people who could be more efficient with their time, I wouldn't always feel so feel pressured and stressed."

"The quality of our work would improve dramatically if we weren't so short-staffed and short-skilled."

This is, in fact, the reality that so many non-profit leaders feel compelled to endure.

They come to work each day in dreadful anticipation, worried that the second they walk through the door, they will be inundated with desperate calls for help.

They get these strained, "are you kidding me?" looks every time they ask something new from their people.

They're bombarded with complaints – from supervisors, board members, and/or customers – about shoddy performance and reduced product quality.

And they wish that they could simply throw money at the problem, by hiring more people, or better yet, bringing in more talent to their team.

But for most of the non-profit leaders that I work with, that's just a pipe dream. (That's why they come to me in the first place.)

Does this describe you?

It sure was my situation.

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When I got started in July 2010 as head of school of a 360 student, independent K-8 with limited resources, my administrative team and I simply did not have the manpower or the competitive advantage that so many other schools in our community enjoyed.

Staffing shortages were everywhere.

We had no admissions director or marketing professional.

There was no resource room, let alone anyone to staff it.

Computers were formally taught only to our youngest grades, and by the librarian.

No one had seen a salary raise or had their pension fund contributions matched since the market tanked in 2008.

Our athletics team coaches were all volunteers. They even drove our kids to the games since we had no budget for bussing.

And then there was our administration. The three of us shouldered a myriad of responsibilities that extended well beyond conventional school leadership.

Compounding the problem were the expectations from our board, who expected me to significantly raise the school's academic standard after years of perceived complacency.

Stress levels were high as we all tried to do more with less.

I remember clearly how one day, one of my administrators walked into my office. Her expression told me that she was upset, and tired.

"What is it?" I asked. "No one is going to say anything to you," she began, "but you're pushing them too hard." By "them", she was referring to office staffers who I had tasked to update our systems and modernize communication, as well as our admin team.

They were working hard – as I was – to move the school forward, and it was taking its toll.

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I needed to scale back and find a different way to get the job done or I would be faced with mutiny.

And that's what so many non-profit leaders today are dealing with.

You've probably suspected that this problem is not just something that you struggle with. And you're 100% correct.

In fact, throughout the world and in every industry, today's leaders feel mounting pressure to achieve more with less.

No longer can they simply bring on staff as needed to get the job done. Higher-ups have told them that there is no room in the budget and they'll have to find another way.

So, these leaders do what they can.

They work longer hours and ask the same of their people, even when they know how much it's resented.

They neglect their health and wellbeing and try to get by through any means possible.

They give their people tasks that they're not properly trained to do because there's no one else to do it.

And they know that what they're doing is unsustainable, but they can't see a way out.

The results are predictable.

Service quality diminishes.

Enrollment and / or memberships decline.

Donors shift their contributions elsewhere.

Stress levels increase.

Morale plummets.

Questions are asked and fingers are pointed.

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Workers start calling in sick.

Some quit or threaten to do so.

Leaders burn out if they aren't phased out, all the while thinking that their manpower shortage has doomed them to their inglorious fate.

And the downward cycle continues, with no apparent end in sight.

Sound familiar?

Such was the case for my client Pearl.

Pearl is a school leader, and a really good one at that. When I first started working with her, I heard from her superiors, colleagues, and direct reports how wonderful and caring she was. From our conversations, I learned how hard Pearl worked to get to know and connect with each of her students and to best meet their needs. She was also deeply committed to her teachers and wanted nothing more than to help them shine.

But Pearl was running out of steam.

After twenty-plus years in the field, she still couldn't find a way to get out of the office at a decent hour.

In fact, it had gotten worse for her over that time.

Her staff struggled to live up to Pearl's lofty aspirations, and there was real concern about how things would play out. Students were not getting the attention they deserved, and their needs were not being adequately met.

While everyone loved Pearl, she knew that something needed to change, and quick.

She was on the Burnout Freeway and repeatedly told me that if she didn't find a way to delegate more and share her burden, she would have no choice but to resign.

Her path was simply unsustainable.

Has this happened to you, too?

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4 COMMON MISTAKES UNDERSTAFFED NON–PROFIT LEADERS MAKE

Perhaps the saddest part of all this is that non-profit leaders can improve their situations – often significantly – if they take the right steps to address it.

The problem is that they consistently make the same mistakes, which only exacerbate their circumstances.

In my research and in working with clients, I have seen these four mistaken responses repeated again and again.

Do any (or even all) of these describe you?

1. They accept the outcome as inevitable

The first and perhaps largest mistake understaffed leaders make is that they come to accept their "fate". They and their people are simply going to struggle.

They don't see a way around their problem and assume that their "new normal" won't end very well.

While no one will suggest that being understaffed is an ideal situation, the fact that they resign themselves to a negative outcome makes it much harder for them to step up and overcome their challenges.

2. They burn their candle at both ends

Non-profit leaders often feel that they must make up for the staff shortage by working longer and harder while asking their people to do the same.

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This is simply unsustainable. Added work may be a reasonable ask on occasion, but it can't be the long-term answer.

3. They fail to maximize existing potential

Often, leaders don't recognize what they have already on staff in terms of team member capacity. Leaders tend to think of certain workers as being limited to only doing what they've always done and don't feel that they can get any more out of them. Certainly, they wouldn't be able to give them significantly different, even more challenging work.

Truth is, the solution to a staffing problem is often right in front of us, if we're willing to take a closer look and reexamine our preconceptions.

4. They underestimate their leadership impact

Leadership is a very powerful force that drives people forward and creates harmony of purpose. Too often, leaders underappreciate their impact and fail to see how their thinking and behavior can improve things. Yet, we all know of great leaders who have inspired their teams through a wide host of challenges. Great leadership can make up for many shortcomings.

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A BETTER SOLUTION EXISTS

Fortunately, all is not lost.

It IS possible for leaders to drastically increase team productivity while alleviating anxiety and stress.

How? By following a few high-impact strategies, you can not only meet expectations but even exceed them!

You can go from "understaffed and underperforming" to "understaffed yet over-delivered".

You can exceed all reasonable expectations: your boss', your board's, your team's, and even your own.

Sounds great, doesn't it?

After all, isn't that what we're all looking for? Ways to do more with less?

However, before we go any further, I need to make something very clear.

For you to achieve the impact that you seek, you will need to commit to grow as a leader and get more out of your team than you ever have before.

It will take effort and lots of learning. And it will involve successes as well as setbacks.

There are no shortcuts or easy fixes. I am not here to sell you a bag of goods.

But the rewards, in terms of increased performance, elevated morale, and decreased stress, will be well worth it.

So, are you ready to get out of the spiral and forge ahead?

Great! Let's get started.

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"E.P.I.C." ACTION ITEMS THAT WILL HELP YOUR TEAM THRIVE

You know what effective teams look like.

You've seen how well they work together, communicate, and get the job done. They seem less stressed than others and tend to enjoy their work more.

Perhaps most important, they have a sense of direction and feel capable of achieving breakthrough results even when they lack manpower.

How do such teams develop? It begins with leadership.

By implementing the four action items detailed below, non-profit leaders can help their teams achieve this desirable outcome.

Each item is powerful and impactful in its own right.

Do any one of them and you are sure to see a major difference in your team's performance.

When done together, however, they compound to make an exponentially bigger impact in helping understaffed leaders get their teams humming.

I like to think of these four items as being "E.P.I.C.", as in making an **EPIC** impact on your bottom line, stress levels and sense of fulfillment.

"E.P.I.C." stands for:

- ❖ Expect – Set clear targets so that everyone is focused and engaged.
- ❖ Pull together– Pull your team together and connect them deeply to the mission.
- ❖ Influence – Influence and lead those around you.
- ❖ Communicate – Communicate clearly and openly.

Expect + Pull together + Influence + Communicate = E.P.I.C. results.

This may sound simple and straightforward, but I must warn you. There's much more here than meets the eye.

Let's unpack each of these further to discover their true impact.

1

Expect –

Set clear targets so that everyone is focused and engaged.

Item 1 of E.P.I.C. is "expect", to get with your team and set targets that are clear, measurable, and meet specific outcomes.

We do our best when we have a target to shoot for. Effective teams know what's being asked of them and how to prioritize their efforts.

In contrast, teams that underperform do not have such awareness. They may work hard, but their effort lacks direction and harmony.

It's like a hamster spinning his wheel and not getting anywhere.

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You'd be surprised how many teams and team members just "get to work" in the hope of cutting through the weeds, without developing a real plan on how to do it or determining if it even needs to be done in the first place.

Even worse, the work is often redundant or conflicts with others' efforts.

Can I assume that you and your team has struggled with this as well?

Let's find out.

Begin with this self-assessment. Consider each of these statements along the "strongly disagree" (1 point) to "strongly agree" (5 points) continuum. Check the box for each item that best reflects your current reality.

Exercise 1: Job / project clarity survey

Item	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Based on your job description, you fully understand the requirements and performance expectations of your role.					
There is a regular review of each team member's objectives and priorities.					
Each project is clearly mapped out with actionable outcomes before work begins.					
Subtotal	__ x 1 =	__ x 2 =	__ x 3 =	__ x 4 =	__ x 5 =
Total					

I suggest that you ask your team to complete this as well.

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If you (individually and / or collectively, as an average) scored below a 12 on this exercise, then this area needs more attention.

Here's another exercise. This one is even more fundamental and far-reaching.

Answer these questions about your current work.

Exercise 2: Current work objectives

➢ What are we trying to achieve, in terms of output, customer engagement, or other metrics? In other words, what are our goals?

_____

_____

➢ To achieve these goals, what work is required, and at what level of quality?

_____

_____

➢ Who is responsible for this work?

_____

_____

➢ What defines successful completion of our work? (I.e. how will it be measured and assessed?)

_____

_____

➢ How can we support each other in achieving those goals?

_____

_____

How did you do? Did you breeze through them? Or is more thought and conversation required?

If you and your team were able do this quickly and unhesitatingly, then you are in good shape and probably don't need much help with Item 1. (In that case, go ahead and skip down to Item 2 on page 15.)

If you couldn't, get with your people right away to work through each one and seek to ensure their commitment and buy-in.

Now, we'll need to convert your answers into structured, actionable goals.

Why, you ask?

Because without clearly written goals, it'll all remain fuzzily in your collective memories, if you're lucky.

But if you go through the extra steps of writing down and committing to a set of goals, you will build alignment and amplify output.

Here is a list of commonly-used goal setting tools that can help you get moving with direction and purpose.

1. SMART – Set SMART goals that are specific, measurable, action-oriented, realistic, and time-bound;[1]
2. OKR – Think of your actions in terms of their Objectives (future direction) and Key Results (metrics which indicate that you're making progress);
3. KRA – This is a list of the most important tasks (Key Responsibility Areas) that you do every day to win at the workplace.

---

[1] For more on building clarity and SMART goal setting, including step-by-step guidance and easy-to-use templates, please see Appendix A.

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*(An easy way to remember these tools is "SMART OKRA", as in "it's a **smart** move to plan to eat **okra** (a healthy plant)". A bit tacky, perhaps, but so long as you remember, who really cares?)*

Once you have agreement as to what must get done and by who, roll up your sleeves and start to make things happen.

In Pearl's case, a primary "expect" (Item 1) goal was to delegate more effectively. She felt that by delegating, she could set more realistic expectations around her work and that of those around her.

To do that, Pearl first worked on listing the many tasks and responsibilities of school leadership. Then, we analyzed them to determine which tasks she was uniquely qualified to do.

From there, we identified internal people who could assume the other tasks and set benchmarks by which this transference of responsibility would occur. See Appendix A for how we turned this into a SMART Goal.

(Oh, and in the process, we also hammered out her job description, something that she didn't have despite more than twenty years on the job!)

The result was a much relieved and rejuvenated leader.

What you will gain by completing Item 1 (Expect):

- ✓ Collective and individual job and task clarity that empowers you and your people to be strategic, take initiative, innovate, and deliver desired results.

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2

Pull together —

Pull your team together and connect them deeply to the mission.

You've seen it many times. The bickering. The lack of healthy communication. Folks sitting quietly at their desks, hoping to stay under the radar and not be burdened with more work, let alone someone else's work. Other folks prioritizing their wants and needs over those of the team.

Territorialism. Silos.

Without question, silos and the turf wars that they enable devastate organizations by wasting resources, killing productivity, and threatening goal achievement.

Undermanned teams in particular are a recipe for divisiveness.

As demands increase, individuals start to think in terms of self-preservation and protecting their turf. Of course, this is the exact time when team members ought to be pulling together and complementing one another. Those that do can more than make up for shortages in manpower and individual expertise.

Meet Morris

When Morris, a small business owner and a NYC–area independent school board president, called me, he was at wit's end. His board was not functioning properly and there were too many competing agendas.

Most significant was the rift that had developed between him and the school's executive director. To make matters worse, members of his board had lined up on both sides of the argument, making a pathway forward harder to access. They needed someone to step in swiftly and bring folks together.

I'll describe below how I helped him.

It's the leader's job to construct powerful, cohesive teams that support and rally around one another and complement each other's skills sets.

That's Item 2. Pull your team together.

So, how can you know whether your team needs a "pull together"?

One simple way is to ask them. Survey questions can give you some great feedback about team cohesiveness and collaboration. At meetings, ask folks for ways to bring the team together even more. Engage a consultant to lead safe conversations and probe deeper.

This team cohesion survey can help get the conversation started. I suggest that you complete it now, before reading on. Have your people complete it as well.

Exercise 3: Team cohesion survey

Item	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
There is a general sense of cohesion and camaraderie amongst team members.					
Team members support one another.					
Team members are matched with appropriate role based on their qualification, skills, knowledge and talent.					
Team members are certain about their individual roles in relation to the team.					
Members of the team fully understand one another's roles.					

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Item	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
There is absolute clarity about who plays a role in each specific task.					
Important work gets done because it is clear as to who is responsible for it.					
Team members consistently resolve role conflicts among themselves.					
Objectives of some team members conflict with those of others.					
Subtotal	__ x 1 =	__ x 2 =	__ x 3 =	__ x 4 =	__ x 5 =
Total					

(A total score below 36 would suggest that there's some work to do to produce greater team cohesion.)

If you need/want to build a more cohesive team, start with **team-building activities**. When done thoughtfully and properly, these activities are a great way of improving communication, morale, motivation, and productivity. They help employees get to know each other better and learn more about each one's strengths and interests.

Keep in mind that bringing teams together involves more than getting folks to work willingly with each other. It also means fitting your pieces

In the case of Morris' board, I led a two-day offsite that got people talking about the organization's priorities as well as their own thoughts and concerns. The conversation went deep and was at times contentious. But at the end, we arrived at a consensus-driven plan of action that healed the rift and put the organization on an upwards trajectory.

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together in a way that covers all the bases while making sure that you aren't forcing square pegs into round holes.

To do this, **use a skills gap analysis**.

A skills gap is the difference between skills that employers want or need, and those that their team members currently offer. Conducting a skills gap analysis helps you identify the skills your people possess as well as those that they will need to master to meet your business goals. From there, you can begin to determine the answers to such questions as:

- ➢ What strengths do our people presently have that can best help us meet our mission?
- ➢ Are they currently positioned to help us succeed?
- ➢ What training programs will most directly address our current shortfall and get our people up to speed?

Once you have greater clarity about the skills needed to move forward, get with your people to develop a plan that will maximize on their individual talents and supplement their learning where needed.

What you will gain by completing Item 2:

- ✓ Better-connected and cohesive team that works together to solve problems and fill in gaps.
- ✓ Deeper understanding of individual and team strengths and the steps needed to build efficacy.

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3

Influence —

Influence and lead those around you.

At the heart of great leadership is influence, as in the ability to influence others to do what needs to get done.

This is especially true when we're understaffed and need to maximize every ounce of talent and time at our disposal.

I assume that this holds true for you as well.

You may be thinking, "How can I know if I am really doing my job well and getting the most out of my people? Maybe my self-perception is not what others think of me."

Valid point. You might be doing well, but there are always gaps between your self-perception and how others think of you.

Always. That's just the way it is.

So, leaders who really want to know how they're doing need to be willing to get honest feedback.

Item 3 of E.P.I.C. focuses you on yourself, as leader and CIO, Chief Influence Officer.

Many leaders use some form of leadership assessment, such as 360-degree feedback or a psychometric tool, that provides information about leader characteristics, strengths, weaknesses, and personality traits.

> I remember taking my first 360–degree leadership assessment.
>
> My numbers were pretty good, but there were some areas, communication in particular, where I scored much poorer than I thought I would.
>
> I set out to build upon my perceived strengths while also shoring up my identified weaknesses.

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If you haven't done this in a while, now is the time to act. The feedback that you get will form the basis of an action plan to help you become a better leader.

Even if you have, it is still worthwhile to brainstorm on the results with a coach or mentor who can help you make sense of things and maximize your leadership capacity.

This is the action-item of Item 3. **Collect feedback about your leadership proficiency and tendencies** and then use that feedback to build upon your strengths and shore up your weaknesses.

All so that you can get the most out of your understaffed team moving forward.

What you will gain by completing Item 3:

✓ Actionable insights into your leadership practice that will strengthen your impact and drive results.

> When he isn't presiding over a school board, Morris runs a foodservice company. At one point he was grappling with how his character impacted others. Specifically, he wanted to know just how trustworthy his employees found him to be.
>
> I had him complete a trustworthiness self-assessment and also distribute one to key personnel to give him feedback. The results guided our coaching work together to help him strengthen his workplace relationships. His newfound self-awareness helped him to become a better leader and more influential, raising engagement and improving the bottom line.

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4

Communicate –

Communicate clearly and openly.

Clear, open internal communication is important for all leaders. For those leading understaffed teams, however, effective dialogue takes on even greater significance.

You may think that you are communicating well. I did, too (see above). But the only way to know for sure is to **ask**.

Start with this simple question:

➤ Overall, how would you rate my/our internal communication?

Meet Lilly

Lilly began as a part–time bookkeeper for a medium–sized nonprofit. After demonstrating great capacity, she was soon promoted to the post of executive director.

But when she got started in her new role, she quickly realized that there were few systems in place in her office and she needed help pulling things together.

Communication in particular was weak, and the organization desperately needed a system overhaul, in terms of hardware/software and policy changes (who to reach out to for various issues, reasonable timetables for responses, etc.)

The communication plan that we developed helped information flow more smoothly through the office and to constituents both in and out of the building.

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People that I work with ask this to their people and get many responses. I help them to figure out how to process and prioritize the information that they get and **develop a communication plan**.

A communication plan details what needs to be shared with who and how that communication will be delivered.

As part of your plan, seek to **cut down on time drains**. Time is a most valuable resource. It needs to be treasured and used most effectively. Leaders who manage email, meetings, and other time consumers well find ways to get important information across while freeing up their people for their most important tasks.

What you will gain by completing Item 4:

- ✓ Improved leader-team and team-team communication.
- ✓ More efficient use of your people's time.

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TAKING ACTION

To summarize, many leaders and their teams are understaffed and overspent.

They face rising demands and must find ways to perform despite a lack of manpower.

This leads to strained relationships, heightened stress, and burnout.

It also places leaders' jobs in jeopardy.

To succeed in this tough situation, leaders need to bring their people together around a clear vision and common goals and also give them the tools and feedback that they need to thrive.

As challenging as it may be to succeed with an understaffed team, you can do it. But you will likely need to master many more skills than you presently have and do so while trying to keep your team afloat.

And who knows how much time you will have to figure things out?

This presents you with a choice.

Option A:

Spend months developing your leadership skills and getting your team to perform, with a real risk of running out of momentum and commitment before achieving any meaningful results.

Or,

Option B:

Enlist help from someone like me who has done it before and has helped many clients succeed.

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By working with me you will get:

- Greater clarity and sense of direction
- Increased worker focus and engagement
- More cohesive teams that work better together
- Reduced tension and stress
- Improved leadership skills (trust-building, communication, delegation and more)
- And an improved bottom line

All without the burden of taking away from your already limited time.

And you can get this **for a fraction of what it would cost to hire even one more person**.

Trust me on this. The value and ROI are incredible!

I really want to help you, so **I am opening my calendar now for the next two months** to give as many people as possible the opportunity to break free from understaffing and over-deliver.

Here's what we will do on our call:

1. You will tell me about your situation.
2. Assuming the we're a "fit" (after all, I don't want to waste your time or mine), I will perform a quick situational diagnosis and deliver a "quick win" that you can use immediately.
3. We will then dig deeper to clarify your needs and determine the best approach for your long-term success.

All in 30 minutes or less!

If you would like to get started on overdelivering, **schedule a time with me today** at **http://bit.ly/understaffed for a free "Understaffed to Over-Delivery" strategy session.**

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ABOUT THE AUTHOR

Naphtali Hoff, PsyD, helps understaffed leaders and executives optimize their performance and that of their teams.

Naphtali is President of Impactful Coaching & Consulting, LLC. He is an accomplished executive coach, organizational consultant, and sought-after trainer and lecturer. His book, Becoming the New Boss, helps new and transitioning leaders hit the ground running and enjoy sustained success.

Naphtali completed his doctorate in human and organizational psychology, which analyzes successful individual or organizational change and development, and holds two master's degrees in education and educational leadership, respectively.

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Appendix A

A Deeper Look at "Expect" (The 1st element of the E.P.I.C. solution)

On pages 10 - 14, we talked about "expect", as in how to set clear targets so that everyone is focused and engaged.

There, I made a basic case for setting clear goals that will get everyone around you aligned and humming.

In this section, we will go deeper – much deeper – into how to set awesome, impactful, "SMART" goals that clarify roles within your organization and get the workplace humming.

SMART Goal Setting

Goal setting is a critical component of any growth process, personal or professional. There are many benefits of setting goals, including…

- Clarity and Focus – Goals motivate us to cut through the weeds and get focused on what's really important.
- Planning – Goals help us map out the necessary steps to achieve our desired result.
- Accountability – Goals force us to set and meet deadlines and be accountable to others.
- Transparency – When shared, goals help others understand what we're focused on.
- Self-esteem – Goals raise our self-confidence as we see ourselves grow and progress.

And who wouldn't want more motivation, better planning, increased accountability, and more?

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But let's try to make this more than a mental exercise. We need to infuse some emotion into this as well.

For goals to be effective in moving us forward, they need to be expressed in actionable terms *that also detail how you would feel* from achieving your objectives.

When we tie emotions to outcomes, we activate feelings within us that motivate us towards achievement.

A Gallup study by researcher James K. Harter and his colleagues found that business unit sales and profits at one point in time are predicted by employees' feelings at earlier points in time. People's emotions impact their performance, and if they're healthy and happy they perform better.

One way by which we can get closer towards actualizing our potential is to set "S.M.A.R.T." goals.

There are a few different versions of the acronym S.M.A.R.T. Perhaps the most popular one is this:

SMART Goals Guide	
Specific	» What exactly needs to be accomplished? » Who else will be involved? » Where will this take place? » Why do I want to accomplish the goal?
Measurable	» How will I know I've succeeded? » How much change needs to occur? » How many accomplishments or actions will it take?
Attainable	» Do I have, or can I get, the resources needed to achieve the goal? » Is the goal a reasonable stretch for me? (neither out of reach nor too easy) » Are the actions I plan to take likely to bring success?
Relevant	» Is this a worthwhile goal for me right now? » Is it meaningful to me—or just something others think I should do? » Would it delay or prevent me from achieving a more important goal? » Am I willing to commit to achieving this goal?
Time-bound	» What is the deadline for reaching the goal? » When do I need to take action? » What can I do today?

- Specific – well defined, you know exactly what you seek to achieve;
- Measurable – quantifiable in a way that helps determine whether the goal has been achieved;
- Attainable – a goal that is within reach, largely because of your deep desire to attain it;

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- Rewarding – fulfillment of the goals should provide you with a feeling of satisfaction and achievement; (NOTE: many put 'realistic' or 'relevant' here – see example to the right – as in has anyone ever achieved this before, or how is this aligned with my key objectives, respectively)
- Time-bound – set to a timeframe to ensure continued, focused efforts towards attainment.

S.M.A.R.T. can also stand for…

- Specific – see above
- Meaningful – something that is important to you and will serve to motivate you;
- Agree upon – the task should be agreed-to by those tasked to complete it;
- Results-focused – the goal should be written in terms of outcomes;
- Trackable – progress should be trackable to determine that efforts are on track.

Before we dive into this further, let's speak first about intention.

Perhaps the most important letter in the S.M.A.R.T. acronym is "s", which stands for *specific*. Specific is the Who, What, Why and How of the goal.

- Who will do the work.
- What will be done.
- Why that is important.
- How you will achieve the goal.
- How doing this will make you feel.

Goals should be simplistically written and should clearly define what you are going to do.

Say, for example, you seek to concentrate more deeply on a specific task, such as writing a proposal, for longer durations. To do that, set specific goals of what you would like to work on and for how long. Include elements that will keep you from becoming distracted and/or motivate you to stay on task.

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It may read something like this:

> *"In order to complete the proposal (specific goal), I will set aside 30 minutes at the outset of each morning for the next four days for in-depth, uninterrupted work.* (what)

> *"By completing this important task first thing in the morning, I can do it while my mind is freshest and still attend to many other tasks and responsibilities afterwards.* (why important)

> *"During this time, I will not answer phone calls, respond to emails or texts, or engage in any form of web surfing.* (how achieved)

> *"When the proposal is completed, I will feel as if a huge burden has been lifted from my shoulders and that I am infinitely closer to closing this deal."* (how you'll feel)

Determine how you will measure success, in terms of your ability to work for X minutes without interruption, complete a percentage of the task in Y minutes, or something similar.

Make sure that the goals that you set are attainable and not beyond the pale of what is presently realistic (this, of course, can and should change as you grow in this area). Then, set a timeframe for your goal to keep you on task and moving in the right direction.

Detail how this goal is rewarding. In this example, the reward may be that others get what they need in a timely fashion and/or that you don't need to stay late to get it done.

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Now, let's look at how this breaks down in "SMART" terms.

Component	Details
Specific?	Yes. (30 minutes of uninterrupted work at the beginning of each day for four days.)
Measurable?	Without question. (Did I work for the stated duration without interruption or not? A timekeeping app may be useful here.)
Attainable?	Indeed. (I can block out the time on my calendar and leave my phone off or set to 'silent'.)
Rewarding?	Absolutely! (What a difference it'll make when I am done with this proposal.)
Time-bound?	Check. (30 minutes a day over four days.)

Other "goal worthy", outcomes might include:

- Becoming more knowledgeable about work-related or other topics;
- Better relationships with co-workers;
- Improved fitness and weight loss;
- Leaving the office by 6:00 PM each evening.

This process of setting proper goals and sticking to them may require the help of others, such as a coach, mentor or spouse.

We are all busy and can sometimes lose focus or drive if we don't have others supporting and pushing us to reach higher.

The key is the 3 c's – clarify, contract and commit – so that this goal does not become another flash of inspiration that quickly fades into distant memory.

How does this sound? Are you in?

Before you get started with setting SMART goals, however, we need to first take a step back and answer some big-picture questions (below).

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This is really important, because it sets the tone and direction for everything that follows.

After all, how can I start to hammer out the details when I haven't clarified the overarching aim?

It's like setting goals for a trip without knowing what kind of journey you are going on or to where.

Here are the questions. I like to think of them as a Big Picture Framework.

> ➢ What are we trying to achieve, in terms of output, customer engagement, or other metrics? In other words, what are our goals?
> ➢ To achieve these goals, what work is required, and at what level of quality?
> ➢ Who is responsible for this work?
> ➢ What defines successful completion of our work? (I.e. how will it be measured and assessed?)
> ➢ How can we support each other in achieving those goals?

The following is a completed example of a Big Picture Framework, based on my work with Pearl (see page 14).

Question	Answer	Details
1. What are we trying to achieve, in terms of output, customer engagement, or other metrics?	Increased delegation of administrative tasks	Too many tasks have fallen on the principal's lap, forcing her to stay late and sapping her energy
2. To achieve these goals, what work is required, and at what level of quality?	1. Listing of existing principal tasks 2. Delegation of some of those tasks to others	1. Principal and coach to brainstorm existing tasks 2. Use chart to move % of tasks to others

Question	Answer	Details
	3. Must be performed at competent level (defined per task)	3. Principal to coach delegee in task performance
3. Who is responsible for this work?	Principal, with coach support	Ongoing process to learn and apply delegation principles
4. How will the goals be measured and assessed?	20% of tasks recorded in the current principal to-do list (measured in terms of time required to complete) transferred to others within 4 weeks	After 4 weeks, meet to revisit list and determine next steps
5. How can we support each other in achieving those goals?	1. Coach to support principal in achieving goals 2. Principal to support delegees in learning new responsibilities	Regular check-ins to see how other is faring and what can be done to support further

Now it's your turn.

Question	Answer	Details
1. What are we trying to achieve, in terms of output, customer satisfaction, or other metrics?		
2. To achieve these goals, what work is required, and at what level of quality?		

Question	Answer	Details
3. Who is responsible for this work?		
4. How will the goals be measured and assessed?		
5. How can we support each other in achieving those goals?		

Once you have completed your Big Picture Framework, use this SMART Goal Setting Template to iron out the specific goal(s) that will help you get there. Below is an example based on the Big Picture Framework completed above.

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Name: _____   Date: _____

SMART Goal Setting Template

SPECIFIC	• **Who** will do this work. • **What** do I/we want to achieve? • **Why** do I/we want to accomplish this? • **How** will I/we achieve this? • **How** will doing this will make me/us feel?	To cut down on her work day and focus on the most important tasks that only she is qualified to do, Pearl commits to delegating 20% of her existing tasks (measured in terms of time required to complete) to others within 4 weeks. She will create a master list of tasks and identify those that can be delegated. Achieving this goal will help Pearl feel relieved and rejuvenated.
MEASURABLE	• How will I/we measure my/our progress? • How will I/we know when the goal is accomplished?	Delegation of 20% of existing tasks in four weeks. Tasks being completed satisfactorily by delegee.
ATTAINABLE	• How can the goal be accomplished? • What are the logical steps I/we should take? • Do I/we have the necessary resources to accomplish this goal?	• Meeting with coach to learn delegation techniques • Identifying delegee candidates • Selecting appropriate tasks to delegate • Mentoring delegee on task performance
REWARDING	• Is this a worthwhile goal? • Is this the right time? • Is this goal in line with my/our long-term objectives?	• Will give principal desired goals of more personal time and focus on most essential tasks • Principal at wit's end – needs immediate action
TIME BOUND	• How long will it take to accomplish this goal? • When is it due? • When will I/we work on this goal?	• Four weeks for first 20% of delegated tasks • One session weekly with coach • Four hours weekly with delegee

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Below is a blank template for your own SMART Goal setting.

SPECIFIC	• **Who** will do this work. • **What** do I/we want to achieve? • **Why** do I/we want to accomplish this? • **How** will I/we achieve this? • **How** will doing this will make me/us feel?	
MEASURABLE	• How will I/we measure my/our progress? • How will I/we know when the goal is accomplished?	
ATTAINABLE	• How can the goal be accomplished? • What are the logical steps I/we should take? • Do I/we have the necessary resources to accomplish this goal?	
REWARDING	• Is this a worthwhile goal? • Is this the right time? • Is this goal in line with my/our long-term objectives?	
TIME BOUND	• How long will it take to accomplish this goal? • When is it due? • When will I/we work on this goal?	

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Here is another SMART template, which is particularly useful if you prefer to write out your goals in detailed, linear form.

SMART Goal Setting Template II

Name: _____   Date: _____

1) Write down your goal using as few words as possible.

My goal is to:

_____

_____

2) Make your goal detailed and SPECIFIC. Answer who/what/where/how/when.

_____

_____

3) How will you reach this goal? List at least 3 specific action steps:

    a) _____

    b) _____

    c) _____

4) Make your goal MEASURABLE. Answer how much/often/many.

Add details, measurements and tracking details. I've reached my goal when I have reached the following measures:

_____

_____

5) Make your goal ATTAINABLE. Is this goal realistic? Yes/No.

   a) What do you need for success?

   _____

   b) Preconditions needed to achieve this goal:

   _____

   _____

   c) How much time is needed:

   _____

   d) Things I need to educate myself and the team about:

   _____

   e) Additional resources to look through:

   _____

6) Make your goal RELEVANT. Is what you want to achieve important in long-run? Yes/No.

   Why you want to reach this goal? Is it aligned with your company's overall objective? _____

7) Make your goal TIME-BOUND. Answer when.
   a) I will reach the goal by: _____/_____/_____.
   b) Halfway measurement will be _____ on (date) _____/_____/_____.
   c) Additional dates I need to set:
      a. _____/_____/_____ – (purpose) _____
      b. _____/_____/_____ – (purpose) _____
      c. _____/_____/_____ – (purpose) _____

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Write out your SMART goals:

Goal 1

Goal 2

Goal 3

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