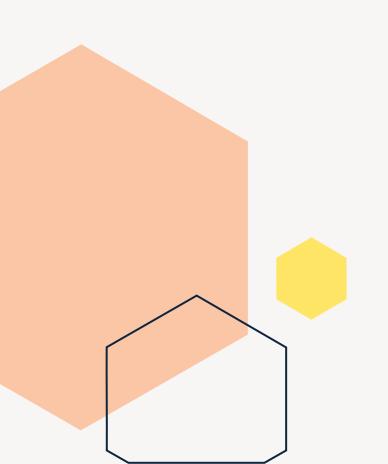# RCCO Connected Strategic Self-Service Aligned Goal Toolkit

Aligned Goal Setting

Step 1: Gather inputs, identify key priorities, and draft plain-language goals.

- Look "up" to identify inbound direction
- Identify your team's major contribution opportunities
- Draft plain-language goals

Step 2: Review plain language goals to identify and draft your most important success measures as Key Results

- Refine plain language goals that need increased measurability into Key Results
- Identify cross-functional opportunities and dependencies

Step 3: Review & extend your goals to increase objective measurability & learning

- IF possible, consider which of your measurement territories would benefit from increased objective measurement of progress, and
- Where does your team need to set some riskier goals *for the purpose of learning*, not just achievement?

Step by step aligned goal-setting worksheet "how to"

Gather and clarify goal territories, write measures of success, and notice additional areas of possible experimentation + improvement

Step 1:
Gather inputs, identify key priorities, and draft plain-language goals.

Review the available inputs to goal-setting and identify:
1. Which of them does your work relate to most closely & importantly?
2. What is the most important goal your team could set together to maximally contribute to that company Key Result?

Output:
- What plain language goals would help your team maximally contribute to the company's success?
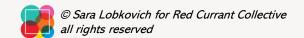- What plain language goals would help motivate and energize your team?

Step 2:
Review plain language goals to identify and draft your most important success measures as Key Results

Review each plain language goal and consider:
- Which of these are activities?
- Which of these are (or need) measures of success?

Output:
- For any goals that merit or require measurement, work to write them in the form of a Connected Strategic™ Key Result
- Optional: Also identify:
  - What are the most important cross-functional measures of success your team influences but does not fully control?
  - Are there any dependencies you have on other teams to achieve maximum possible impact on the company OKRs?

Step by step aligned goal-setting worksheet "how to"

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Step 1:
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Review plain language goals to identify and draft your most important success measures as Key Results

Extension: Set objectively measurable progress goals
Consider: where do we have progress measurement gaps today?

Where is it hurting our performance or adding risk that we don't yet have objectively measurable progress indicators?

- Are there areas we're experiencing "watermelon measures" (green status reports all quarter, red on a major outcome?)
- Where do we feel like we're "flying blind" or operating on "hope" during the quarter, where we'd rather have good "signal" on our progress?
- How else is your team's performance measured or evaluated? What are territories you know need improvement or ambitious goal-setting?

Extension: Set learning goals
Consider: where must we get courageous with innovation, experimentation, learning?

Is there anywhere really important for this team to get courageous about experimenting and learning?

- Are there places we're missing opportunities right now because we're being too conservative?
- Anywhere in our business where we have to courageously experiment and learn to move the needle?

Step 1: Goal prioritization / territory identification

Clearly identify (1) which company-level goals (or other "top-down" goal inputs) this team has responsibility for, and (2) what other "bottoms-up" territories this team sees as most important for goal-setting, and (3) enunciate plain language goals around those priorities and territories.

Company-level OKRs this team supports

P1 *Prioritize:*
What are the most important opportunities from Step 1 to consider KRs for?

P1 *Plain language:*
How does this team support that territory? Are there sub-measures of success for this team that we can identify as goals here? Or does the L1 KR just "roll down" directly?

Workshop notes & Actions
Notes & Actions from our workshop time

Key Result Candidates
Objectively-measurable outcome goals and/or leading indicators to help us quantify our progress (& know whether we are on track or behind pace)
Ideal forms:
1. Increase [metric] by ___% (from ___ to ___)
2. Increase [desired / observable behavior] by ___% (from ___ to ___)

Key Milestones (Commits)
If we can't arrive at a measure, is there a milestone we can commit to?

Key Initiatives / Activity Plans
If we can't arrive at Key Results or Milestones, what activity workloads are planned to support this priority area?

Team Key Result Territories

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Step 2: Goal refinement worksheet

Progress from goal ideas to aligned measures of success

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