

GETTING STARTED GUIDES

Designing Your Approach:

Goals

What's inside

Why Goals.....	03
How it Works.....	04
Optimizing the Experience.....	05
Making the Technology Seamless.....	07
Getting Started with Goals.....	08
Additional Features.....	10
Prepare to Launch.....	11

Why Goals

Most organizations recognize the value of employee and team goals. Goals help employees focus on tasks and priorities throughout the year to drive organizational performance.

Goal-setting and execution is much more than a means to achieve your organization's bottom line, though. Goals play a pivotal role in impacting the engagement of your employees. Approaching goals with thought and intention can:

- Motivate employees and teams
- Promote and prioritize the right behavior
- Make it easy for employees to know if their performance is on the right track
- Provide transparency into the organization's goals and progress
- Illustrate how employee and team effort contributes toward the organization's mission and success

Your approach to goals can do more than just inform employees what success looks like. It can transform your organization and drive engagement year-round.

How It Works

The goals feature inside Quantum Workplace's employee engagement software helps move your organization forward by allowing users to:

- Set performance-based or developmental goals
- Choose their preferred goal format - SMART goals or OKRs
- Align individual, team, and organizational goals
- Easily update goals to signal progress
- Quickly assess progress in the organization

Optimizing the Experience

Goals can be the heartbeat of the organization, which means they can become a pillar for celebration, conversation, and development. With this in mind, Quantum Workplace's employee engagement software can help you maximize your approach to goals and drive employee engagement.

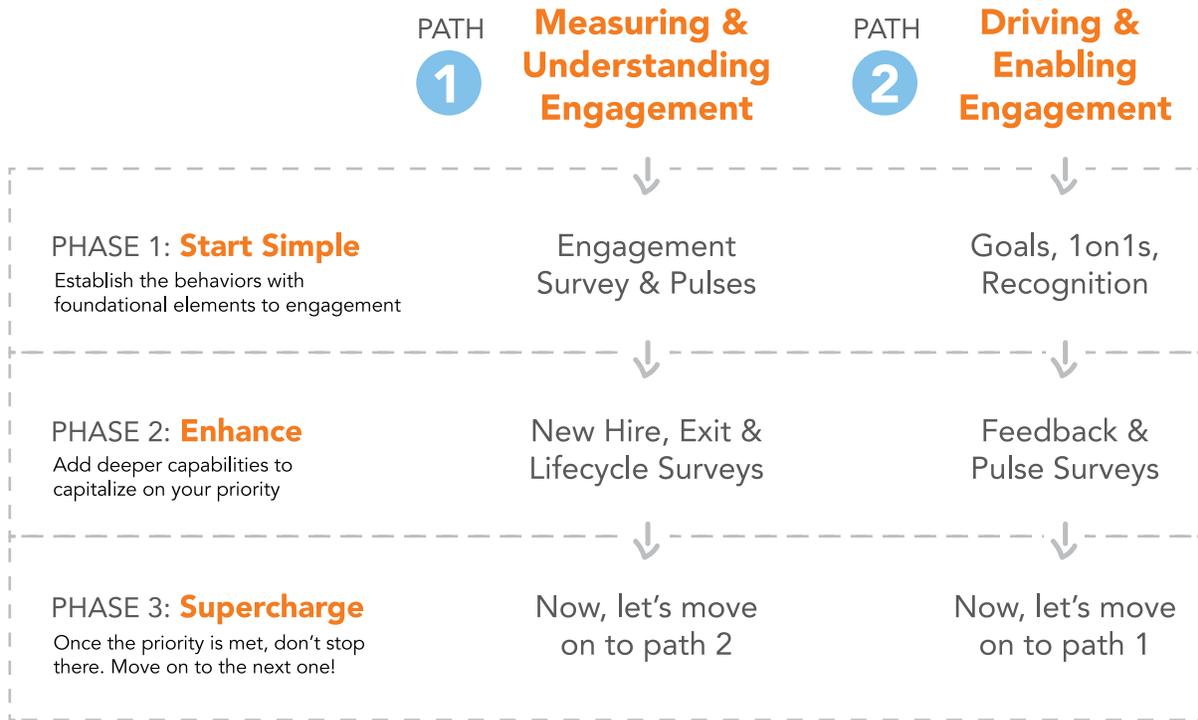
Before goals are set, managers and employees can leverage 1-on-1 conversations to clarify expectations and priorities. These 1-on-1s provide an opportunity to draft or refine goals, plan time for checking back in, and ensure managers and employees are on the same page.

Public goal updates can spark great recognition. Encourage teams to celebrate when a milestone is reached or other progress is made using the recognition feature.

Too often a goal is achieved without collecting feedback from the team about what went well and what went poorly. The feedback feature is perfect for a constructive post-mortem that helps goal owners learn and move forward ready to set even better goals.

Curious where to start? Check out a roadmap below or chat with a Quantum Workplace team member for ideas.

What's your main priority?



Making the Technology Seamless

Before diving into the specific design of your approach to goals, we recommend that you begin the process of HRIS Integration and Single Sign-On. (If your organization has already done this with Quantum Workplace, you're all set to jump ahead and start creating goals!)

HRIS Integration allows your organization's roster of employees, their demographics, and all reporting relationships to be accurate and up-to-date in our software. This provides a seamless experience for your users, helps you analyze usage and data in meaningful ways, and allows automation of some of the features. The setup time can take a few weeks, but it's worth it!

Single-Sign On will prevent your employees and managers from needing to remember yet another set of login credentials, making it easier for users to adopt features into their everyday workflow.

We like to get this process started early so it's complete once you're ready to launch the software to users. Not a tech person? No worries! Your Client Success Manager will partner directly with your technical team members.

Getting Started with Goals

Revamping your goal-setting and execution process takes a bit of muscle. Regardless of whether you have something that works or if everyone is waiting for something better, you're introducing a new behavior and process. Identify the answers to these questions and you'll be well on your way to improving your organization's approach to goals:

➤ **Where do goals currently exist?** It's typical for organizations to have several places where goals live (paper, Excel, etc.). How much consolidation is needed to bring all goals together in one accessible spot? How much education about the new process will your employees need? The effort will be worth it, though. Quantum Workplace provides a single place for goals to reside with easy functionality for your employees and managers. Additionally, goal alignment and transparency inside Quantum Workplace's goals feature are critical to creating an engaging approach to employee goals.

➤ **Do we have well-defined organizational goals?** This is key to creating the alignment and ownership you want your teams to have. Before placing those lofty organizational goals into the Quantum Workplace's goals feature, use this time to make sure organizational goals are clearly articulated and described. The point is to allow department managers and individual contributors to be able to easily connect with the goals they are supporting.

› **How can we ensure employees feel empowered and confident about goals?**

Ultimately, you want employees to feel confident about setting goals that they feel matter and are important to the organization. Consider having managers set up time for 1-on-1 conversations to take place, where employees can ask questions and feel good about the goals they put in place. This applies to both performance and developmental goals.

› **What type of framework should we use for setting our goals?** Our goals feature allows for two types of goals to be set: Objectives and Key Results (OKRs) or SMART Goals. Even if your organization has no preference and wants teams to decide what's best for them, communicate! The question is bound to arise and you want employees to feel confident in their approach. [Here is more information about the difference between the two types of goals.](#)

› **What is our comfort level with transparency?** Goals can be set as private or public, determining who has visibility into what we're aiming to accomplish and the progress that's being made. While private goals make sense in certain situations (performance improvement goals, personal goals), public goals provide transparency and promote alignment within the organization. This is particularly important for organizational goals.

Once you've thought through these questions, it's time to learn more about the goals feature inside Quantum Workplace's employee engagement software. Your Client Success Manager will walk you through the functionality and next steps so your organization can begin a more engaging approach to goals!

Additional Features

Your Client Success Manager will walk you through all the functionality of the goals feature. Here is some functionality worth noting:

- **Reporting:** We want to make tracking progress easy. With the click of a button, quickly get a snapshot of the progress your team, direct reports, department, and organization has made. You can even filter by keyword, date, and individual names for more detail.
- **Email Digests:** While you can check into all goal activity within our tool, we'll also meet you in your inbox. Get an automated email providing summaries of progress and reminders to check in to update your own goals.
- **Build a Culture Around Goals:** Our tool helps teams encourage and applaud the efforts of others by prompting recognition and "liking" while your viewing the updates of others.
- **Customize Goals Focus:** We recognize that all goals don't necessarily serve an organizational purpose. People also want to track progress on things that will help them grow individually. For this reason, goals can be categorized as personal or developmental, organizational or departmental.

We could go on and on about all the bells and whistles, but we'll save some topics for the conversation with your Client Success Manager.

Prepare to Launch

In addition to designing your implementation of these tools, it's important to prepare the end users – your managers and leaders. Quantum Workplace's strategic communication plan will help you think through important communication touchpoints during different phases:

- 1 Pre-launch:** Announce the purpose of updating your goals process and how the technology will help with execution. It'll also help to communicate leadership's commitment to the change and how it will impact managers and employees as well.
- 2 Launch:** Kick off the process by sharing that organizational goals are in place. Also, share how-to guides and provide a means for collecting feedback and questions.
- 3 After launch:** Share best practices and encourage that individuals update their goals and like or recognize the efforts of their peers.

Speaking of best practices and tips, Quantum Workplace is continuously adding to our library of resources for your managers! Our Engagement Studio videos connect your managers to our QW experts. Some example videos include:

[6 Questions to Ask Before Setting Goals \(Coming Soon\)](#)

[How to Set Better Work Goals in 7 Easy Steps \(Coming Soon\)](#)

Your managers and employees can directly access these helpful resources in our software, and you're welcome to link to these resources if you want to share them with others.

Ready to get started? Us, too! Your Client Success Manager will walk you through next steps, and we're happy to answer any questions not covered for you in this guide.