



Effective Documentation and Communication of Goals

I have spent the past few weeks discussing goals and goal setting. Now I would like to set forth some requirements for the successful documentation and communication of these goals. It would be a great waste of time, effort, and talent to fail simply because the goals, or how to measure them was unclear.

I recommend creating a document that contains the following four sections for each goal. I provide two straightforward examples for each section. The first is business oriented. The second is personal. I intentionally simplified the example to show how simple goal setting, tracking, and reporting could be. The process will not be useful if it is too complicated.

1. Title
 - a. State the goal
 - b. Example 1: “Achieve \$1.3M in revenue by August 30, 2013 for product X”
 - c. Example 2: “Lose 15 pounds and achieve a 32” waist line by June 25, 2013”
2. Rationale
 - a. Explain why we are working toward this goal
 - b. Example 1: “To meet our division’s portion of the global sales plan for the new product launch”
 - c. Example 2: “To look great at the beach during summer vacation”
3. How are the results to be measured?
 - a. Example 1: “Use the guidelines provided by the finance department on February 1, 2013”
 - b. Example 2: “My weight will be measured on the bathroom scales at 6am each morning. My waist measurement will also be taken at 6am, using the yellow tape measure, standard posture, breathing normally”
4. Reporting Mechanism
 - a. How are we to report the progress toward the goal?
 - b. Example 1: “The finance department will provide a standard report every Monday showing the previous week’s results”



c. Example 2: “I will record my weight and waist on the calendar stored in the vanity in the master bath”

There is it, a simple, straightforward, and functional method of recording and communicating goals. I urge you to try it, and I would appreciate you letting me know how it works for you.

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