



**4 Steps to**

# **Refine and Execute Your Team Goals**



## Follow a simple formula.

Too many leaders set vague goals like “improve customer retention,” leaving their teams unsure of how well they’re doing or even exactly what they’re working toward.

This simple formula, from FranklinCovey’s *4 Disciplines of Execution*<sup>®</sup>, provides a powerful way to identify “where you are today, where you want to go, and the deadline for reaching that goal.”

By using this formula to talk about goals in more specific and measurable ways, it makes them easier to understand and communicate.

Here’s how to do it.



# 1. Choose one critical team goal.

Focus on less in order to accomplish more.

Start by identifying one important goal. This doesn't mean your other goals aren't important; you and your team are going to give special treatment to one that is more important than the others.

By narrowing the focus on one key goal, you'll find that your team will accomplish it. When it comes

to goal setting, the law of diminishing returns is as real as the law of gravity. If you have four to ten goals, we have found you'll only achieve one or two.

Teams lose focus when they have too many priorities.

**Identify your team's ONE goal that will receive special treatment.**

## 2. Restate the goal as “From X to Y by When.”

Defining a starting line, a finish line, and a deadline.

Every goal at every level must contain a clearly measurable result, as well as the date by which that result must be achieved.

For example:

- **Vague goal:** Improve customer retention.
- **Refined goal:** Increase the percentage of customers who renew from 65 to 75 percent by the end of this year.

**What is your From X to Y by When of the team goal you identified?**

If you find that the goal you picked doesn't easily fit into this structure (perhaps because it's a goal to explore something unknown), at least consider adding any relevant, specific details and a “by When” to make the goal time-bound.

For example:

- **Vague goal:** Test sales approaches in the new market to learn which one prospects best respond to.
- **Refined goal:** Test three sales approaches in New York City to learn which one prospects best respond to by the end of next quarter.

### 3. Seek input from your team on the refined goal.

The difference in performance between a team that simply understands their goals and a team that knows the measurements is remarkable.

Depending on your situation, you might present your From X to Y by When goal statement to your team for feedback or draft the goal statement together. Regardless, getting your team's input

is important for buy-in and to ensure you're setting a challenging but achievable goal that is measurable. Ask your team questions like:

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**“How could we make this statement even more clear and specific?”**

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**“How, if at all, will refining the wording of this goal change our approach to meeting it?”**

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**“How realistic is this Y target given where we are now and how much time we have?”**

## 4. Use the new language when talking about the goal.

Great teams operate with a high level of accountability.

Without accountability, team members will go off in all directions with everyone doing what they think is most important. By identifying how the goal will be reached, you and your team will ensure it's successful.

You and your team will need to do more to plan how you'll reach the goal:

- How will you get from 65 to 75 percent retention?
- How will you determine which sales approach to try?

**Identify those things your team will need to answer/do to reach your goal.**

# Have the confidence to move the metrics that matter.

Your goals are not as clear as you think they are.

After more than 4,000 engagements with organizations worldwide, we've discovered one startling fact: The further you move from the leader on the organization chart, the cloudier the goals become and the less engaged people are. And when goals are vague, your employees attempt to translate what they think you need. When they are not engaged, they generate very little activity around those goals.

In surveys conducted with more than 60,000 teams, we found only 15 percent of team members know the organization's/team's top goals, and only 23 percent of those people are engaged and committed to the goals. Take measures now to avoid becoming part of those statistics.

Our Execution Design Session prevents ambiguity and brings focus to strategic intent. We help you identify the highest-leveraged Wildly Important Goal® (WIG®) at the executive level and translate the pursuit of that WIG into a winnable game. At the end of the session, your team will:

1. Develop clarity and commitment around the overarching WIG.
2. Determine the key battles (sub-WIGs) necessary to support the WIG.
3. Prepare a draft communication plan and narrative on your strategy and key targets.
4. Set up your 4DX® OS executive team.

**FranklinCovey provides business-execution solutions that will transform your business and change how you and your team work together on top priorities.** Our world-class performance-improvement solutions — delivered Live-Online or Live In-Person — are designed to help you execute on your organization's key breakthrough results.

To learn more, email us at [info@franklincovey.com](mailto:info@franklincovey.com), visit [franklincovey.com/the-4-disciplines](https://franklincovey.com/the-4-disciplines), or

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