

Goal Setting

Writing SMART Goals Using a SWOT Analysis

For use in AT Unlimited Onboarding Training Sessions



Instructional Design Document

1. Project Context

AT Unlimited's employee retention has declined in the past 2 years. Their turnover rate has increased from 10.9% to 20%. They are unsure of what makes a successful employee at AT Unlimited. This course on goal setting will be added to the onboarding tasks new employees complete. AT Unlimited wants employees to feel more supported from day one. Though it will not be the only factor to impact the turnover rate, this course aims to help employees set position-specific goals from day one that are realistic enough to prevent burnout. Participants will use a SWOT Analysis to consider their Strengths, Weaknesses, Opportunities, and Threats. Then, they'll write SMART goals for their first 90 days at AT Unlimited that are Specific, Measurable, Attainable, Relevant, and Time-Bound.

2. Analysis

Based on qualitative data gathered in exit interviews, employees are leaving AT Unlimited because they feel unsupported in their roles. The company's onboarding process is too short- employees feel they got basic training on the company's history and essential processes in their positions before being "thrown in" with little support. New hires are not given information on success measures, which has led to them experiencing burnout after taking on too many tasks and not setting realistic goals for themselves. Based on this, AT Unlimited has requested training on goal setting, which will give new hires a foundation for success in the company. New hires will keep track of the goals they set with their managers, who will also receive a separate training on helping employees set and stick to realistic expectations. Managers and new hires will consolidate their knowledge in their regular one-on-ones.

The target audience for this training will initially be new hires going through their onboarding. These employees will primarily be in entry-level positions and are either career starters or changers. These employees are new to the field so they might not have a lot of experience in creating measurable goals for their positions. The solution should have a lot of background information on goal setting as well as their job description on hand so that the learners don't have to start from scratch.

The learners will take this course in the office when they come in for the onboarding sessions during the first week of their contract. They will be in groups of about 10-15 new hires in each session. Any digital media will be distributed for them to work on their company issued laptops. Learners will have a participant guide on paper, and any other materials like writing utensils for notetaking will be provided by the company as well. They will take the instructor-led training in a conference room so that they can actively participate in the training and foster relationships in the new hire cohort.

3. Trainer Requirements and Flexibility

An ideal trainer for this course will be an onboarding specialist within the Human Resources Department. They have an equal combination of success measurements and onboarding facilitation experience. However, if an onboarding specialist is not available an HR specialist may facilitate, as the content takes precedent to the training experience. HR specialists will have the knowledge of employee success in the company and empathy needed to guide new hires through this process.

4. Desired Outcomes

The goal of this course is to help new hires set goals and know where they can seek support in the company. By using a SWOT Analysis to create SMART goals, employees are able to create personalized, attainable goals that take their strengths into account. They will also find support in their new hire cohort, as they will use their goals to connect with each other.

Performance Goal: The goal of this course is to help the company reduce their turnover rate to 12% by the end of the year. To help achieve this, additional support will be given during manager one-on-ones where they will give new hires guidance on achieving the goals set in this training.

Training Goal: The goal of this training is for participants to have the foundation to set SMART goals that will lead them to success at AT Unlimited.

Learning Objectives:

- New employees will identify their strengths and weaknesses using the SWOT Analysis strategy.
- New employees will create goals that align with their strengths and weaknesses using the SMART goal strategy.

5. Instructional Strategy

The information in this course will be delivered with synchronous instructor-led training. They will also have access to a job aid after the course should they need to reference the information again. Static slides will be used in PowerPoint to show the information to the learners. Depending on the time available, learners will participate in one or two case studies at the end of the training.

This training is mainly driven by self-determination theory which suggests that Learners must feel that they have autonomy, competence, and relatedness in the training before they can grow and apply the knowledge they learned from the training. SMART goal setting will help the learners feel like they have gained some autonomy by aligning their work with their personal values. They will also feel competence knowing that they have the tools to go out and succeed in their roles. With the instructor-led training format, they will also feel relatedness because they will be socially connected with the other new hires.

6. Assessment Strategy

Learners will be assessed over 2 concepts: the process of completing a SWOT analysis, and the process of writing a SMART goal. They will be expected to understand and apply the steps of each process. They will be assessed through 2 formative assessment questions and 2 summative activities. The formative assessments will consist of the following multiple choice questions:

Businesses use a SWOT Analysis before

- a. they make any high-risk decision. (correct answer)
- b. they consider hiring someone.
- c. they commit to a company merger.
- d. they choose to have a force reduction.

What does the A in SMART goals stand for?

- a. Ambitious
- b. Achievable (correct answer)
- c. All-purpose
- d. Anchoring

The actual SWOT Analyses and SMART goals the learners will write are the summative assessments.

Based on the Kirkpatrick Model, training evaluation at levels 1 and 2 (reaction and learning) can occur during the training with a satisfaction survey at the end and the formative assessments respectively. Level 3 (impact) will occur when learners will use their SWOT Analyses and SMART goals in their 1 on 1s with their managers every other week. They will check in on their progress on their goals, and see if they have improved any items on their SWOT analysis. At level 4 (results), the Human Resources department will keep track of turnover rate during the next 2 quarters.

7. Course Format or Structure

Full outline available at the [end of this document](#).

Time	Segment	Details
10:00 - 10:15 (15 minutes)	Icebreakers Session Goals	• What's Your Flavor? Game • Basic goal: Identify your strengths and write SMART goals.
10:15 - 10:25 (10 minutes)	Lesson 1, Part 1: SWOT Analysis Overview	• What does SWOT stand for? • Why do we use a SWOT analysis? • What are the steps for completing a SWOT analysis? • Formative assessment: 1 multiple choice question in participant guide
10:25 - 10:40 (15 minutes)	Lesson 1, Part 2: SWOT analysis completion	• Guide learners through completing a SWOT analysis in their participant guides
10:40 - 10:50 (10 minutes)	Break	
10:50 - 10:55 (5 minutes)	Energizer	Modified " Bucket List " Activity segues in to SMART Goals
10:55 - 11:05 (10 minutes)	Lesson 2, Part 1: SMART goals overview	• What does SMART stand for? • Why do we use SMART goals? • What are the steps for writing SMART goals?

		Formative assessment: 1 multiple choice question in participant guide
11:05 - 11:20 (15 minutes)	Lesson 2, Part 2: SMART goals completion	Guide learners through writing SMART goals in their participant guides
11:20 - 11:30 (10 minutes)	Recap and Ending Survey	- Share out 1 SMART goal - complete survey on the last page of the participant guide

8. Development Tools

The slide deck will be designed using Canva and PowerPoint. The facilitator guide will be created in Microsoft Word. The participant guide will be created in Canva. AT Unlimited will use their in-house printing services to create copies of the facilitator and participant guides.

9. Project Management

This training must be completed and ready to be facilitated by the end of 8 weeks. This will include time to create facilitator and participant guides, arrange for a facilitator, and test the training for any errors. See below for a timeline of tasks to be completed by the end of each week:

*The tasks are not bound to each week; they may be worked on ahead of time.

Week	Tasks to Complete
1	Meet with stakeholders, get training approval, secure budget funds
2	Full course outline, facilitator guide and participant guide drafting, send for feedback
3	Implement feedback on guides
4	Secure facilitator, send facilitator and participant guides to the facilitator
5	First training test, fix issues in assets
6	Present training to stakeholders, obtain and implement feedback
7	Obtain materials for training, book conference room, send new hires onboarding schedule
8	Facilitate training with first group of new hires

Goal Setting w/SWOT and SMART: Outline

- Icebreakers
 - What's Your Flavor?
 - Introduce yourself with:
 - Your name
 - Your new role
 - A flavor that describes you. It could be a spice, ice cream flavor, anything!
- Lesson 1: SWOT Analysis
 - Overview: What is a SWOT Analysis?
 - What is a SWOT Analysis?
 - Primarily used by businesses, a SWOT Analysis is used to consider major factors before making a big decision.
 - S: Strengths
 - W: Weaknesses
 - O: Opportunities
 - T: Threats
 - What can a SWOT analysis do for you?
 - Going through the SWOT Analysis process can help you take a realistic look at your goals and how to achieve them.
 - 3 benefits:
 - Identify your best qualities
 - make a plan to improve your weaknesses
 - understand the factors you can and can't change in your life
 - Success Factors
 - Environmental
 - Internal: Things only you can control and change, like your goals and strengths
 - External: Things that are out of your control, like available opportunities and time constraints
 - Process
 - Helpful: helpful in your process to achieve your goals
 - Harmful: harmful to your process to achieve your goals
 - SWOT Quadrant
 - The components of a SWOT Analysis are usually organized into a quadrant that connects the internal/external factors with the harmful/helpful factors.
 - Formative Assessment: Multiple Choice

Businesses use a SWOT Analysis before

 - a. they make any high-risk decision. (correct answer)
 - b. they consider hiring someone.
 - c. they commit to a company merger.
 - d. they choose to have a force reduction.
 - What are the steps for completing a SWOT Analysis?
 - **Strengths:** Write a list of your skills and qualities that may give you an advantage.

- **Weaknesses:** What do you lack confidence in? What might other people see as a weakness?
 - **Opportunities:** What are your goals? What opportunities are available to help you achieve them?
 - **Threats:** What obstacles are you facing? Are there aspects of your life that might hold you back?
- **Complete a SWOT Analysis in Participant Guide**
- **Energizer: Bucket List Game**
 - Think...
 - What's something on your career bucket list?
 - Do you think you'll be able to check it off?
 - Share with 1 person around you.
 - In the next lesson, you'll create goals based on your bucket list that use the SMART Goal framework.
- **Lesson 2: SMART Goals**
 - **Overview: What is a SMART Goal?**
 - **What does SMART stand for?**
 - S: Specific
 - M: Measurable
 - A: Achievable
 - R: Relevant
 - T: Time-Bound
 - **Why do we use SMART goals?**
 - The SMART acronym helps you personalize your goals and make sure you're able to reach them.
 - You'll create a SMART goal to achieve by the end of your first 90 days.
 - **Formative Assessment: Multiple Choice**

What does the A in SMART goals stand for?

 - a. Ambitious
 - b. Achievable (correct answer)
 - c. All-purpose
 - d. Anchoring
 - **What are the steps for writing a SMART Goal?**
 - When paired with a SWOT Analysis, using the SMART framework is easy.
 - S: Determine what you want. What is one of the goals you wrote down in your SWOT analysis that pertains to this department?
 - M: How will you measure your goals? This will also tell you when your goal has been achieved. For example "I will make 5 interest calls."
 - A: Don't try to give yourself a goal that is outside of your scope. For example, recruiting coordinators don't have the resources to complete account management tasks.
 - R: Is this goal relevant to your First 90-day plan?
 - T: When do you want to achieve this goal?

- **Great Examples:**
 - As a new instructional designer, I will earn the AT Unlimited Instructional Designer Certification by the end of my first 90 days by completing 1-2 modules a week.
 - As an onboarding specialist, I will guide 90% of new hires through completing necessary onboarding by the end of their first 30 days at AT Unlimited.
 - As a client success manager, I will use a new approach to deliver support to our customers with at least a 95% satisfaction rate by the end of the 3rd quarter.
- **Write SMART Goals in Participant Guide**
- **Session End**
 - **Recap- share out your SMART goal**
 - **Complete the training satisfaction survey on the last page of your participant guide**
 - How would you rate the overall quality of this training?
 - How well were session goals met?
 - The goals I wrote today will prepare me to be successful at AT Unlimited.
 - The content of the training was valuable to my work.
 - I will continue to use the content from this training in my work.

Participant Guide Components (9 pages total):

- Title page
- Welcome page with agenda and session goals
- Assessment questions
- Job aids
 - SWOT Quadrant with steps included
 - SMART Goal Setting
- Blank SWOT Analysis
- Blank SMART Goal Setting form (2)
- Training Satisfaction Survey