## **Goal Setting**

# Writing SMART Goals Using a SWOT Analysis

For use in AT Unlimited Onboarding Training Sessions



# **Training Facilitator Guide**

#### **Course Title:**

Goal Setting: Writing SMART Goals with a SWOT Analysis

### Background:

This training was created to offer support to new hires during onboarding. It will equip participants with the skills to assess all aspects of themselves and their lives with a SWOT Analysis before setting a goal using the SMART Goals framework. This training has 2 instructional sections and should not take longer than 1.5 hours to complete.

### **Course 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 framework.

#### Format:

In person during the participants' first week at the office, with 10-15 participants in each session.

### Room Setup:

This can take place in a conference room or other room with enough sitting room for all participants. Seating may be one large conference table, or 4-5 tables big enough to fit groups of 4.

#### Materials:

- Slide Deck
- Participant Guides
- Computer with Projector (sound connection not needed)
- Writing utensils (pens and pencils)

#### **Training Outline:**

- Introductions and Icebreakers 10:00 AM to 10:15 AM (15 minutes)
  - Welcome participants
  - Introduce trainer
  - o Play Icebreaker game What's Your Flavor?
  - Introduce Session Goals
- SWOT Analysis Overview 10:15 AM to 10:25 AM (10 minutes)
  - 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
- SWOT Analysis completion 10:25 AM to 10:40 AM (15 minutes)
  - Trainer will guide learners through completing a SWOT analysis in their participant guides
- Break + 5-minute Energizer 10:40 AM to 10:55 AM (15 minutes)
  - Participants and trainer will take a 10-minute break

- Bring participants back into the training with an energizer What's on your bucket list?
- SMART Goals overview 10:55 AM to 11:05 AM (10 minutes)
  - O What does SMART stand for?
  - Why do we use SMART goals?
  - What are the steps for writing SMART goals?
  - o Formative assessment: 1 multiple choice question in participant guide
- SMART Goals completion 11:05 AM to 11:20 AM (15 minutes)
  - Guide learners through writing SMART goals in their participant guides
- Recap/Next Steps 11:20 AM to 11:30 AM (10 minutes)
  - Share out 1 SMART goal
  - Have participants complete survey on the last page of the participant guide, collect and return to the HR Department

#### Notes:

• The SMART and SWOT acronyms are pronounced in one word. SWOT sounds like "thought."

## **Lesson Content**

Slide # and Topic	Facilitator Notes	Slide Image
1 - Title Slide	Welcome participants in and instruct them to find a seat. Instruct participants to find a seat and make sure everyone is sitting next to at least one person who is in the same department or role.  Introduce yourself with your name, position, and a goal you have for the training.	GOAL SETTING  Writing SMART Goals Using a SWOT Analysis  Wull  Writing SMART Goals Using by SWOT Analysis by
2 - Agenda	<ul> <li>Share the training agenda. Let participants know that:</li> <li>The training will take no more than 1.5 hours, with a 10-minute break after the 1st lesson.</li> <li>There is a satisfaction survey for the training that can be found in their participant guides.</li> </ul>	AGENDA  -Icebreaker -Session Goals -Lesson 1: SWOT Analysis -Overview, benefits, steps -Complete a SWOT Analysis -Perak - 10 minutes -Lesson 2: SMART Goals -Overview, benefits, steps -Winte SMART Goals -Recap and Survey
3 - Icebreaker	What's Your Flavor? Icebreaker  Share the instructions with the participants.  Give participants no longer than 3 minutes to think of a flavor that describes them- it could be anything from a spice to an ice cream flavor.  Share your own choice to start. Have a participant volunteer to go first, then continue around the room (clockwise or counter-clockwise).	WHAT'S YOUR FLAVOR?  Introduce yourself with:  1. Your name 2. Your new role 3. A flavor that describes you. It could be a spice, ice cream flavor, anything!
4 - Session Goals	Share the session goals on the screen.  Let participants know they will use the goals they set in the training in their regular 1 on 1 meetings with their managers.	SESSION GOALS  Today you will  V Identify your strengths and weaknesses  V Create goals that align with your strengths and weaknesses  V Understand the SWOT Analysis process and SMART Goals framework

## 5 - Lesson 1 Title Introduce the first part of the lesson - the SWOT Analysis. **†** Ask participants if they have ever made an SWOT ANALYSIS impulse decision. If yes, have them briefly share the decision and the results. Follow up by asking if they considered the risks at any point. Explain that a SWOT Analysis is usually used as a quick risk assessment for big decisions, but today they'll use the process to set goals. Explain that participants will learn the steps of a SWOT Analysis first, then complete their own at the end of the section. 6 - SWOT Definition Explain that a SWOT analysis is used by businesses to consider major factors before WHAT IS A making a big decision, like mergers or adding SWOT ANALYSIS? new services. Explain the acronym stands for: Strengths Weaknesses **Obstacles Threats** Let participants know that people can also complete a SWOT Analysis for their own goals. 7 - SWOT Benefits Ask participants if they have ever felt BENEFIT 1 unrealistic expectations were set for them. Have them reflect on how it made them feel DO FOR YOU? BENEFIT 2 trying to meet those expectations. BENEFIT 3 Tell participants that going through the SWOT Analysis process can help you take a realistic look at your goals and how to achieve them. Explain the benefits of completing a SWOT Analysis: Identifying your best qualities and making a plan to improve your weaknesses Understanding the factors you can

	and can't change	
8 - Success Factors 1	Explain that in a SWOT Analysis, you consider environmental and process factors. There are 2 types of each.  Define the environmental factors in a SWOT analysis:  • Internal factors are things you CAN control and change.  • External factors are things you CANNOT control and change.	ENVIRONMENTAL FACTORS  DITERNAL  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
9 - Success Factors 2	Define the process factors in a SWOT analysis:  • Helpful factors aid your process to achieve your goals. • Harmful factors hinder your process to achieve your goals.  Explain that by looking at all the success factors together, participants can put their goals in perspective with what's realistic for them, and begin to set goals that are actually achievable.	PROCESS FACTORS HELPUL Things that are helpful in your process to a chieve your goals HARMPUL Things that are harmful to your process to a chieve your goals
10 - SWOT Quadrant	Direct participants to the job aid provided in the participant guide on page 5. It shows the SWOT Quadrant displayed on this slide.  Explain that a SWOT Analysis can be organized into a quadrant that connects the steps with the 4 types of success factors.  • Your strengths are internal and helpful to your goal.  • Your weaknesses are internal and harmful.  • Your opportunities are external and helpful.  • Your threats are external and harmful.  Explain that when the participants write goals in the next lesson, each factor plays a role.	SWOT QUADRANT The components of a SWOT Analysis are usually organized into this quadrant:  OPPORTUNITIES  THREATS

11 - Formative Assessment 1	Direct participants to the assessment questions on page 4 in their participant guides. Clarify that they will only answer question 1 now.  Give the participants 1 minute to answer the question.  Click to show an animation indicating the answer is choice A. If needed, review slide 6 before moving on.	Answer this question in your participant guide:  At they make any high-risk decision.  B. they consider hiring someone.  C. they commit a company merger.  D. they choose to have a force reduction.
12 - SWOT Steps	Direct participants to the blank SWOT Analysis sheet on page 6 in their participant guides.  Starting with "Strengths," review the probing questions in each step as participants write down their answers in their participant guides.  Have participants work with someone who is in their department or role- this is where the seating suggestion in the introduction is useful.  Encourage participants to discuss their answers with each other- maybe someone knows of certain opportunities available, or a person's strength has stuck out to them during onboarding.	STRENGTIS  With a dist of your skills and qualities that may give you an objective for the may give you an objective for any f
13 - Break	Give participants a 10 minute break. Remind them they will move on to Lesson 2 on SMART Goals when they get back.	BREAK - 10 MINUTES
14 - Energizer	When all participants have returned and are settled, display slide 14 with the directions for the energizer.  Ask participants to share their answers with someone they did not work with on their SWOT Analysis. This may require movement around the room.	BUCKET LIST  • 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.

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	After everyone is done sharing, ask participants to raise their hand if they believe they can check off their bucket list item within the next year.	
15 - Lesson 2 Title	To transition smoothly to Lesson 2, continue from the energizer slide.	Lesson 2:
	Explain that being achievable is one requirement of a good SMART goal, which they'll learn about in the next lesson.	SMART GOALS *
16 - SMART Goals Overview	Display the slide, explaining that the smart goals framework helps you consider your strengths and weaknesses to create goals that are  • Specific • Measurable • Achievable • Relevant • And Time-Bound  Explain that using this framework also	WHAT ARE SMART GOALS?  The SMART framework helps you consider you strengths and consider you strengths goals that are.  The smart framework helps you consider you strengths goals that are.  Time-Bound
	motivates you to achieve your goals. It converts broad goals like "I want to get a new job." into "I want to get a job at X company by Y time by doing Z."	
17 - Why use SMART Framework	Explain that the participants will benefit from using SMART goals in this session because  • they are personalized to their strengths and weaknesses and  • will give them a starting point for being successful as an employee at AT Unlimited.	WHY USE SMART GOALS?  PERSONALIZE  The SMART framework helps you personalize your goals and make sure you're able to reach them.  **  CAREFERIANS  SMART Goals help give you starting point for planning out your success as an employee.
18 - Formative Assessment 2	Direct participants to the assessment questions on page 4 in their participant guides. Clarify that they will only answer question 1 now.	Answer this question in your porticipant guide:  C. All-Purpose D. Anchoring
	Give the participants 1 minute to answer the question.	30
	Click to show an animation indicating the answer is choice B. If needed, review slide 16 before moving on.	

19 - SMART Steps	Direct participants to the job aid provided in the participant guide on page 7. It shows the SMART Goals framework and probing questions displayed on this slide.  Introduce the probing questions participants can ask themselves when using the SMART framework. Make connections to the SWOT Analysis by pointing out the use for knowing their opportunities, strengths, and weaknesses.  The animations on the slide will advance with your clicks.	THE STEPS  Using the SMART framework is easy when it is paired with a SWOT Analysis.  When do you want to ochieve this goal?  When do you want to achieve this goal?  When do you want to achieve this goal?
20 - SMART Goal Examples	<ul> <li>Each example will appear with a click.</li> <li>Discuss the examples provided. Point out that they're not just: <ul> <li>I will improve my instructional design skills.</li> <li>I will get new hires to complete their onboarding.</li> <li>I will support our customers.</li> </ul> </li> <li>These examples include all components of the SMART Framework, particularly measurable and time-bound. Some also get more specific by including a strategy to achieve the goal, though that isn't necessary.</li> </ul>	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 nate by the end of the 3rd quarter.
21 - Write SMART Goals	Direct participants to return to their SWOT Analysis sheets on page 6 to reference for this part of the session. They will also need the blank SMART Goal Setting sheet on the page 8.  Have the participants review their SWOT Analysis answers. Do they notice a common theme? Maybe they have a lot of answers about improving a skill, or meeting a quota.  Considering this, participants will begin writing 1 to 2 SMART goals in their participant guides.	Specific  Specific  Specific  Determine what you want. Think more than "I want to be successful" what do you want to be successful in?  How will you measure your gools? This will also help you loose when your gool has been ordered.  Achievable  When you're done, pick one to share with the group.  Time-Bound  Determine what you want. Think more than "I want to do you want to advant to a do you want to advant to you gool? This will done help you loose when your gool has been ordered.  Relevant  Is this good relevant to your 30-00-90 plan?  Time-Bound  When do you want to achieve this gool?

	Starting with "Specific," review the probing questions in each step as participants write down their answers.  Participants should continue working with their partner from the SWOT analysis.	
22 - Session Goals Recap	Have participants share 1 SMART goal they wrote.  Review the session goals with the participants. Tell them they can now use their goal-setting skills to keep track of their goals and make plans to succeed.	YOU'RE GOING PLACES!  Today you have  V Completed a SWOT Analysis to understand the factors affecting your goals  V Used the SMART framework to write realistic goals
23 - Next Steps	Outline the participants' next steps:  If they don't finish their training satisfaction survey before leaving this session, turn in the survey to HR by the end of the week.  They should also have their SMART goals ready to discuss with their managers in their first one on one meetings.	NEXT STEPS  Complete the training satisfaction survey on the last page of your participant gold and return it to HR.  Discuss your SHABT Golds with your manager.