

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:

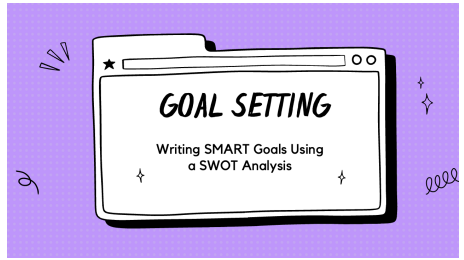
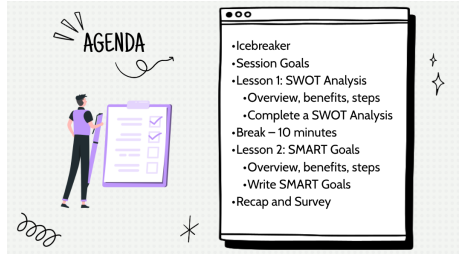
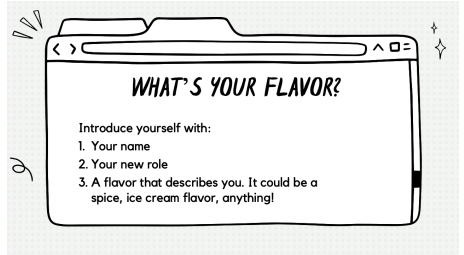
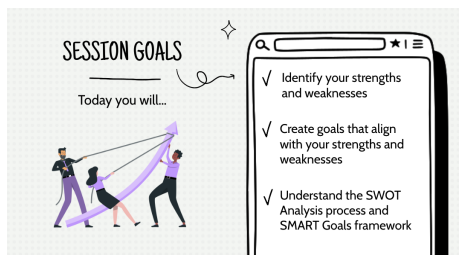
- **Introductions and Icebreakers - 10:00 AM to 10:15 AM (15 minutes)**
 - Welcome participants
 - Introduce trainer
 - Play Icebreaker game - What's Your Flavor?
 - Introduce Session Goals
- **SWOT Analysis Overview - 10:15 AM to 10:25 AM (10 minutes)**
 - What does SWOT stand for?
 - Why do we use 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

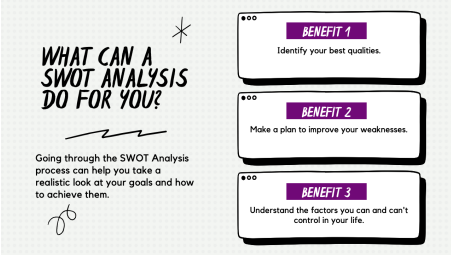
- Bring participants back into the training with an energizer - What's on your bucket list?
- **SMART Goals overview - 10:55 AM to 11:05 AM (10 minutes)**
 - What does SMART stand for?
 - Why do we use SMART goals?
 - What are the steps for writing SMART goals?
 - Formative assessment: 1 multiple choice question in participant guide
- **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

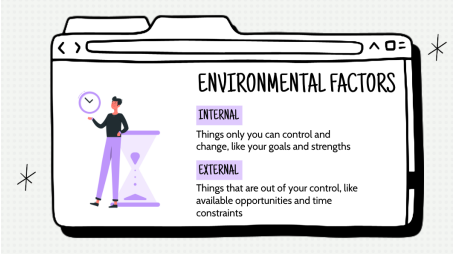
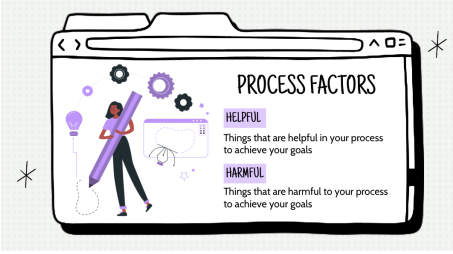
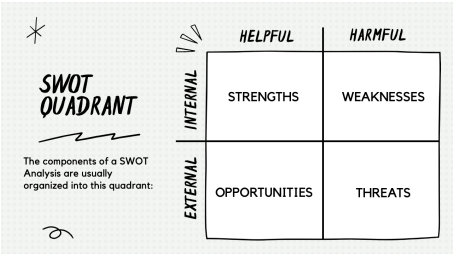
Notes:

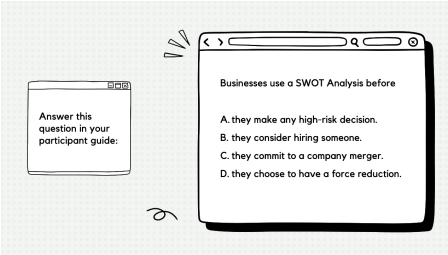
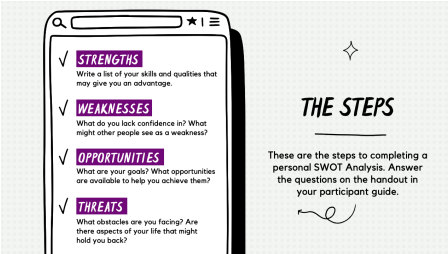
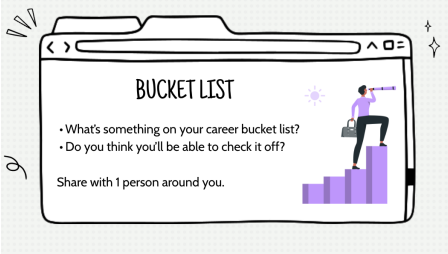
- The *SMART* and *SWOT* acronyms are pronounced in one word. *SWOT* sounds like “thought.”

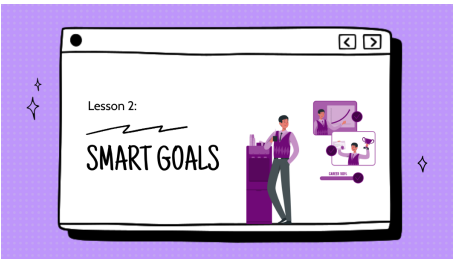
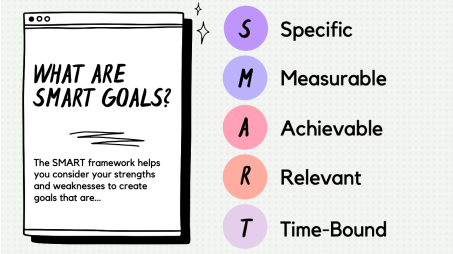
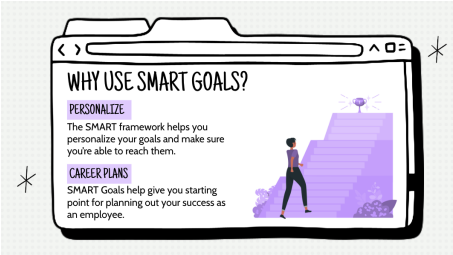
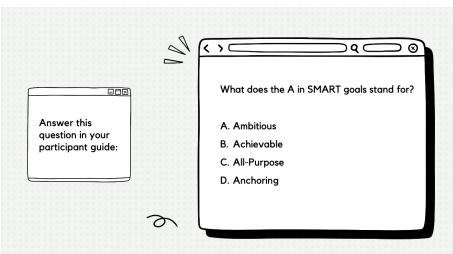
Lesson Content

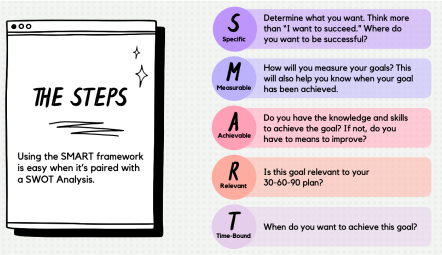
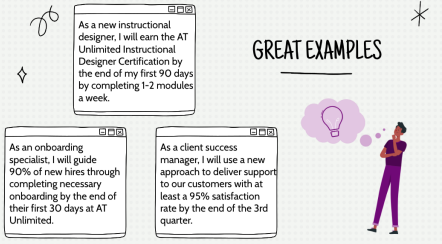
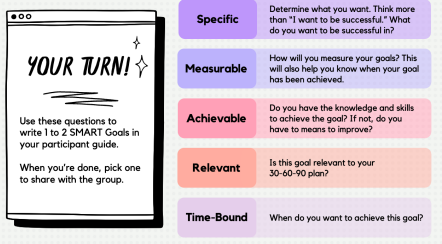
Slide # and Topic	Facilitator Notes	Slide Image
1 - Title Slide	Welcome participants in and instruct them to find a seat. Instruct participants to find a seat and make sure everyone is sitting next to at least one person who is in the same department or role. Introduce yourself with your name, position, and a goal you have for the training.	
2 - Agenda	Share the training agenda. Let participants know that: - The training will take no more than 1.5 hours, with a 10-minute break after the 1st lesson. - There is a satisfaction survey for the training that can be found in their participant guides.	
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).	
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.	

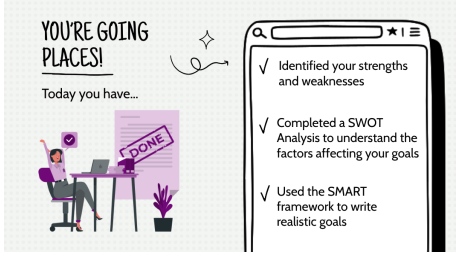
5 - Lesson 1 Title	Introduce the first part of the lesson - the SWOT Analysis. Ask participants if they have ever made an impulse decision. If yes, have them briefly share the decision and the results. Follow up by asking if they considered the risks at any point. Explain that a SWOT Analysis is usually 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 making a big decision, like mergers or adding 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 unrealistic expectations were set for them. Have them reflect on how it made them feel trying to meet those expectations. 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.	
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.	
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.	

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.	
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.	
13 - Break	Give participants a 10 minute break. Remind them they will move on to Lesson 2 on SMART Goals when they get back.	
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.	

	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. Explain that being achievable is one requirement of a good SMART goal, which they'll learn about in the next lesson.	 A digital slide titled 'Lesson 2: SMART GOALS' with a purple background. It features an illustration of a person standing next to a large goal icon.
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 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.”	 A digital slide titled 'WHAT ARE SMART GOALS?' with a light green background. It lists the SMART framework components: Specific, Measurable, Achievable, Relevant, and Time-Bound, each with a corresponding colored circle.
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.	 A digital slide titled 'WHY USE SMART GOALS?' with a light green background. It includes sections for 'PERSONALIZE' and 'CAREER PLANS', explaining how the SMART framework helps in goal setting and career planning.
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. Give the participants 1 minute to answer the question. Click to show an animation indicating the answer is choice B. If needed, review slide 16 before moving on.	 A digital slide for a formative assessment. It asks 'What does the A in SMART goals stand for?' and lists four options: A. Ambitious, B. Achievable, C. All-Purpose, and D. Anchoring. A small box on the left says 'Answer this question in your participant guide:'.

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's paired with a SWOT Analysis. S Specific Determine what you want. Think more than "I want to succeed." Where do you want to be successful? M Measurable How will you measure your goals? This will also help you know when your goal has been achieved. A Achievable Do you have the knowledge and skills to achieve the goal? If not, do you have to means to improve? R Relevant Is this goal relevant to your 30-60-90 plan? T Time-Bound When do you want to achieve this goal?
20 - SMART Goal Examples	Each example will appear with a click. Discuss the examples provided. Point out that they're not just: • I will improve my instructional design skills. • I will get new hires to complete their onboarding. • I will support our customers. 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.	 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.
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.	 YOUR TURN! Use these questions to write 1 to 2 SMART Goals in your participant guide. When you're done, pick one to share with the group. Specific Determine what you want. Think more than "I want to be successful." What do you want to be successful in? Measurable How will you measure your goals? This will also help you know when your goal has been achieved. Achievable Do you have the knowledge and skills to achieve the goal? If not, do you have to means to improve? Relevant Is this goal relevant to your 30-60-90 plan? Time-Bound When do you want to achieve this goal?

	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... ✓ Identified your strengths and weaknesses ✓ Completed a SWOT Analysis to understand the factors affecting your goals ✓ 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 Do these in the next week! - Complete the training satisfaction survey on the last page of your participant guide and return it to HR. - Discuss your SMART Goals with your manager.