



New Dynamics

Performance and goals

SMART goals: a practical guide

Write measurable goals that reflect real work, with examples, a goal worksheet and review questions.

Practical guidance · Worked examples · Printable worksheet

New Dynamics Editorial Team
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www.new-dynamics.com
contact@new-dynamics.com

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Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Write measurable goals that reflect real work, with examples, a goal worksheet and review questions. This practical guide to SMART goals brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Turn a priority into an agreement

A SMART goal is specific, measurable, achievable, relevant and time-bound. Use these questions to make expectations clear, not to force every role into a numerical target. An excellent qualitative outcome can be assessed against agreed evidence, such as a tested handover or a decision accepted by its intended audience.

Start with the problem and the person who benefits. Ask what would be different if the work succeeded. Separate that outcome from the activities needed to reach it. “Attend training” describes participation; “complete a customer handover independently using the agreed checklist” describes a capability.

Check each part before committing

Specific: name the work, its scope and the intended change. Replace “communicate better” with the situation in which communication needs to improve.

Measurable: choose evidence available at a reasonable cost. Define the baseline, denominator and source where you use a number. Agree what counts as a completed or successful result.

Achievable: discuss time, skills, access and dependencies. A goal that relies on another team needs an explicit agreement with that team. Stretch should invite learning, not make failure inevitable.

Relevant: connect the goal to a team priority and the employee’s role. If everything is a priority, discuss what can stop.

Time-bound: set a review date as well as a completion date. A deadline without a check-in leaves little chance to adjust support.

Worked example: a clearer handover

Illustrative starting point: “Improve project documentation.” The team has seen repeated questions when work moves from delivery to support.

A stronger agreement is: “By the end of the next six-week project, produce and test a handover covering ownership, open issues and recovery steps. A support colleague should complete the agreed walkthrough without an unresolved critical question.” The manager

supplies a previous example and books the walkthrough in advance.

The measure is not the number of pages. Evidence is the completed walkthrough and a record of unresolved questions. If the project scope changes, revise the agreement and retain the reason rather than quietly moving the target.

Reusable goal worksheet

- **Outcome:** What should change, and for whom?
- **Scope:** Which work is included and excluded?
- **Starting point:** What evidence describes the current situation?
- **Success evidence:** What would another reviewer be able to inspect?
- **Support and dependencies:** What must the manager or another team provide?
- **Dates:** When will progress be discussed and the outcome reviewed?
- **Quality check:** What prevents an easy numerical result from harming the real objective?

Complete the worksheet together. Ask the employee to explain the goal in their own words before recording it. Different interpretations are easier to resolve now than at a review.

Keep the goal useful as work changes

At each check-in, ask whether the outcome still matters, what has changed and which blocker needs a decision. Distinguish an employee's controllable actions from a delayed dependency. Record a revised goal with its effective date.

After the first cycle, review whether the measures supported useful conversations. Remove measures nobody used. Connect the final discussion to learning and the next priority, using the [OKR guide](#) when the team needs several linked outcomes.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Bring a real type of priority, such as reducing avoidable handover questions. Describe the person who benefits and the current difficulty. Ask the group to write an outcome before naming a target. If no baseline exists, the first useful action may be to observe the process rather than invent a percentage improvement.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Compare two goal statements: one describing activity and one describing an observable result. Identify the source that would show progress, who can influence it and how quality will be checked. Discuss what work should stop or move to make capacity for the agreed goal.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Change one assumption, such as a delayed dependency or a new team priority. Decide whether the goal should be revised, paused or retained with additional support. Preserve the original expectation and the reason for the change so a later review does not judge the employee against a rewritten history.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Ask the employee and manager to state their separate commitments. The employee may own the task while the manager owns access to a specialist or a decision from another team. Book the first review while both people still remember why the goal was chosen.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

How many SMART goals should an employee have?

Use the smallest set that represents the role's important priorities. There is no universal number that fits every job. Too many goals can make prioritisation meaningless, while a single narrow target may omit essential ongoing work. Discuss capacity and the relative importance of each outcome. Keep routine responsibilities visible without turning every small task into a formal goal.

Can a SMART goal measure qualitative work?

Yes. Agree observable evidence and a review method instead of forcing a numerical target. A design proposal might be assessed against agreed customer needs, documented trade-offs and a successful review with its intended audience. The standard should be clear enough that the employee and reviewer can discuss the same evidence. Avoid relying solely on whether a senior person liked the result.

What is the difference between SMART goals and OKRs?

SMART is a way to test whether a goal is clear and usable. Objectives and key results organise a direction and the evidence of progress towards it. A key result can be checked using SMART questions, but the frameworks serve different jobs. Choose the structure that helps the team agree outcomes, dependencies and review points rather than using both merely to create more documentation.

Review the first cycle

Review whether the goal changed a decision or supported useful feedback. Ask whether the evidence was available without excessive administration and whether the quality check prevented a misleading success. If the team met the numerical target but the original problem remains, revise the measure before repeating the cycle.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

[New Dynamics](#) connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete [guide library](#) for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation's approved records. This page is for your own working notes.

Outcome: What should change, and for whom?

Scope: Which work is included and excluded?

Starting point: What evidence describes the current situation?

Success evidence: What would another reviewer be able to inspect?

Support and dependencies: What must the manager or another team provide?

Dates: When will progress be discussed and the outcome reviewed?

Quality check: What prevents an easy numerical result from harming the real objective?

Discuss your next step with New Dynamics: contact@new-dynamics.com