

## Sample SMART goal and action plan

Below is an example of a SMART goal (a goal that is specific, measurable, attainable, relevant and time-bound) and an action plan for reaching it.

### The context:

*Eliza Michaels, who manages a small team of customer service representatives, decides, along with her manager, to draft a training manual. The manual will save valuable time spent training new reps individually, and will help ensure that best practices are captured and integrated throughout Eliza's rapidly growing division.*

*Eliza isn't sure exactly how long it will take to put the manual together, or how long it should be, since she hasn't worked on one before. She asks a manager in HR who often writes training manuals for some guidance, and they determine that a six-month timeframe seems reasonable.*

*Eliza shapes a SMART goal and creates an action plan. First, she breaks her goal down into milestones. Next, she breaks each milestone down into specific actions.*

### Eliza's SMART goal:

Complete the final draft of a 50-page customer service training manual, approved by both the director of HR and the vice president of customer success, by December 31 (six months from today).

### Eliza's SMART goal milestones:

**Milestone 1:** Complete research for the manual by August 15.

**Milestone 2:** Complete a detailed outline by August 31.

**Milestone 3:** Complete a first draft of the manual and send it to the VP of customer success and the director of HR by November 1.

**Milestone 4:** Complete a revision of the manual and send it out for final approval by December 1.

**Milestone 5:** Complete the final, approved draft by December 31.

## **Eliza's milestone activities:**

**Milestone 1:** Complete research for the manual by August 15.

### **Milestone 1 activities:**

1. Meet with the HR director and VP of customer success to discuss and define the manual's scope, as well as their expectations.
2. Create a list of interview questions to ask phone reps.
3. Interview and observe phone reps from every customer service team for input on best practices and customer success stories to include in the manual.
4. Find and review at least five other customer service training manuals used by other companies for comparative purposes — preferably ones recommended by the VP of customer success and/or HR director.
5. Conduct online research on customer success.

**Milestone 2:** Complete a detailed outline by August 31.

### **Milestone 2 activities:**

1. Revisit the scope agreed upon with HR director and VP of customer success, and make any adjustments.
2. Determine the manual's main sections and sub-sections.
3. Pull out quotes, stories, examples and supporting evidence from research and insert these under the appropriate section headers.
4. Show this detailed outline to HR director and VP of customer success to obtain their feedback.
5. Revise and finalize the outline.

**Milestone 3:** Complete a first draft of the manual and send it to VP of customer success and HR director by November 1.

### **Milestone 3 activities:**

1. Write at least 5.5 pages per week from September 1 and October 28 (50 pages divided by eight weeks).
2. Throughout the process, send drafts of phone reps' customer success stories, as well as any direct quotes, to them for approval.
3. Format and proofread the draft.
4. Send weekly updates on the draft's progress to VP of customer success and director of HR, and make any necessary adjustments to the timeline.
5. Email draft to VP of customer success and director of HR and ask for feedback by November 15.

**Milestone 4:** Complete a revision of the manual and send it out for final approval by December 1.

**Milestone 4 activities:**

1. Remind VP of customer success and HR director of the approaching November 15 deadline.
2. Organize and lead a check-in meeting to follow up on comments and feedback.
3. Incorporate changes and suggestions into the draft.
4. Send the revision back to VP of customer success and HR director for final changes, with a deadline of December 15.

**Milestone 5:** Complete the final, approved draft by December 31.

**Milestone 5 activities:**

1. Remind VP of customer success and HR director of the approaching December 15 deadline.
2. Organize and lead a check-in meeting to follow up on comments and feedback.
3. Incorporate final changes and suggestions into the draft.
4. Have one of the writers in marketing proofread the document.
5. Celebrate!