Goal-Setting Checklist

When you’re ready to start setting goals with your company, make sure you have answers to these questions.

Determining Goal Configurations in Lattice

☐ Does your company already have a structured goal-setting process in place?
☐ Where are your employees currently setting goals?
☐ Will you be using Lattice for developmental goals, operational, or both?
☐ How do you refer to goals within your organization?
☐ Does your company use a specific goal framework? (ROCKS, SMART Goals, OKRS, Other)
☐ What types of goals will your company be setting, who will set them, and who updates them?
  ☐ Company Goals
  ☐ Department Goals
  ☐ Individual Goals

☐ How often will your company be setting goals?
☐ How does your organization align goals?
☐ How should employees be measuring their goals? (Binary, Dollar, Number, Percent)
☐ Does progress on individual goals impact department or company level goals?
☐ Would you like goals to factor into your next performance review cycle?
☐ If yes, which goals should be included? Active goals (in progress), ended goals (historical), or both?
☐ Are there a certain number of goals an employee is expected to have?
☐ Do your employees know what types of goals to set? Have they been trained on goal-setting?
☐ How often are employees expected to update their goals?
☐ Do you want employees to see top priority goals on your org chart?
☐ Are goals public in your organization or private to employees and their managers?

Questions? Email hello@lattice.com