

Lattice Manager Best Practices for Goals

Organizations use Lattice Goals to create and manage company goals, department goals, and individual goals. This guide is designed to help managers get started on creating goals with their teams.

Goals Increase Productivity

Goals are an essential performance management tool for organizations.

- The goal setting process gives employees an **opportunity to think critically** about what they can do to move the company forward.
- Goals **increase motivation and encourage problem solving**.
- Updating goal progress regularly **keeps everyone focused on goal-related activities**.

Here's what you need to do to get started with your team.

Understanding Goal Alignment

Goal-oriented companies usually create a goal hierarchy with company goals on top, department goals one step below, followed by manager or individual goals.

In a goal creation cycle, the executive team creates the company goals, department heads create department goals that align with the company goals, and then managers and individuals create goals that align with the department and company goals.

For example, if one of the company goals is “Increase annual revenue from \$10 million to \$20 million,” the marketing department may create a goal to “Increase sales leads by 100%” and individuals on the marketing team will

have goals like “Increase Google Search leads by 25%” and “Increase email sign-up conversion rate from 5% to 6%.”

Introducing Goals to Your Team

Make goal creation a joint effort between you and your direct reports. Meet with employees to explain the goal creation and upkeep process and do your first goal-setting session together.

- Sync on goal setting and learn the goal creation process in Lattice.
 - [Understanding Objectives and Key Results in Lattice](#)
 - [How to Create a Goal in Lattice](#)
- Review the company and department goals and discuss ideas for the employee’s goals.
- Finalize employee goals and enter them into Lattice.

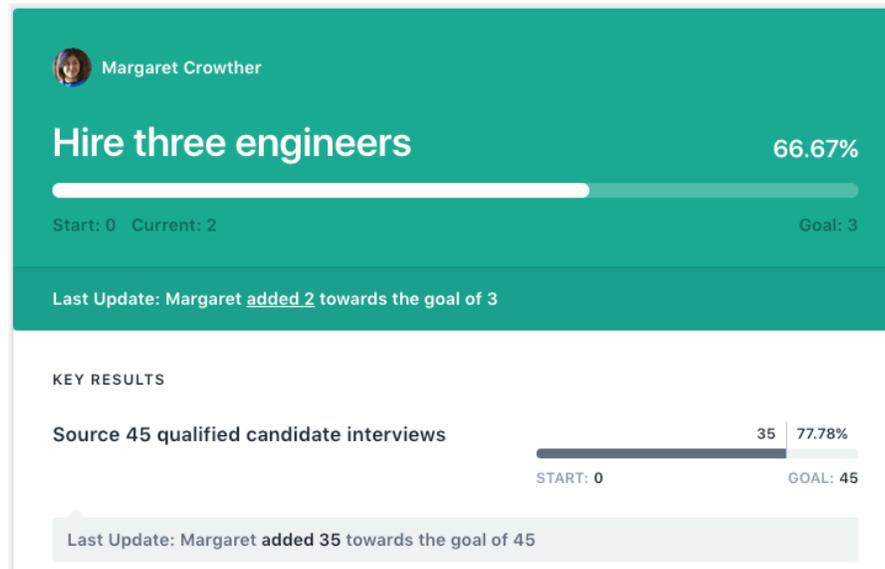
The purpose of the meeting is to teach the employee how to create goals in Lattice, set expectations so that the employee understands the win conditions, and then create the first few goals together so that they become comfortable with the tool.

If you don’t have company or department goals, use your team’s goals or the employee’s job description to guide alignment.

It’s essential to work with employees on goal-setting because studies have shown that individuals perform the best when they set their own goals. Manager-assigned goals can also be effective, but make sure that you explain the reasoning to the employee and achieve buy-in if you want to assign a goal.

How do I set expectations?

Explain how the employee’s work contributes to the success of the business then work together to figure out the baseline metrics necessary to achieve team goals. You can often start by looking at company or department goals and then “back into” a goal metric that an individual can own.



For example, if the company needs to hire three engineers to expand the product team, the technical recruiter can set a goal to hire three engineers with a key result to source 45 qualified candidate interviews.

What kind of goals work best for individuals?

Individuals perform well with goals where they have control over the result. For example, a sales development representative responsible for cold-calling or outbound emailing prospects can own a goal for sales meetings scheduled.

If you have a team goal where everyone needs to work together to achieve the final result, consider adding multiple owners to the goal.

How many goals should an employee own?

Most people perform well with 3-5 active goals. Having too many goals can be overwhelming and reduce focus, but having too few may leave essential projects uncovered.

Any achievement worth measuring should have a goal attached to it. The employee should be able to look at their active goals at any given time to self-evaluate and see how they're performing against expectations.

Goal Upkeep Best Practices

Following a goal update process is essential to keeping goal owners engaged. Here's a process that works for successful teams using Lattice.

Goal Updates

Ask each goal owner schedule a few minutes each week to update all active goals.

- Update key results and goal status
- Mark completed goals as complete

Consider adding a brief goal review session to weekly team meetings or to weekly 1:1 meetings. The review session should cover progress made on key results, goal viability, obstacles, and a discussion about how improve results that will create action items.

Monitoring Goal Progress

Regularly monitor goal progress for team members. You can view all active goals for each report from the ["Your Team" page](#). Managers often set a weekly calendar reminder to look over goal progress.

Ask employees to update active goals that haven't been updated in a while. If the employee is making progress, it should be an easy update to add. If progress has stalled, the request will bump the goal to top-of-mind for the employee.

After Goal Review

Set up a meeting once a goal cycle end-date has passed to grade results and review learnings.

- What were our intended results?
- What were the actual results?
- What worked? What didn't work? Why?
- What can we do differently next time?
- Should we create a new goal?

What happens if company or department goals change?

Goals with longer timeframes (6-months+) should be designed to be less susceptible to business uncertainty, but it's still common for goals to become irrelevant due to sudden changes in the business environment.

In these instances, consider meeting with employees to edit or delete any irrelevant goals and replace them with new goals. Teams using Lattice Goals can course-correct and adapt quickly.