

# SMART Planning

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## Vision and Targets

We tend to use words like *goal*, *vision*, *objective*, and *target* interchangeably to represent our hopes for the future. But hopes without a plan are just wishful thinking. So here is one such plan:

First, make a distinction in your mind between *vision* and *target*.

Let *vision* describe what you hope your life and behavior will be like in some not-too-distance future.

Let *target* identify a specific accomplishment you aim to complete by a certain date.

So a formulation of a vision will be a general description of what you hope to accomplish—like losing some weight. And a formulation of a target will be a specific and measurable accomplishment—like weighing 150 pounds by Thanksgiving. <sup>1</sup>

In this perspective, targets are many steps toward realizing a single vision.

For example, suppose your vision is to make the front of your house more attractive. To make this happen, give yourself a target like “Next Saturday, plant grass in the brown areas.” Then, if you meet that target, set another one, like “By Wednesday, pull up the weeds under the front window.”

## How to Plan Effectively

Second, make sure that your targets actually help you accomplish what you envision. Here's a practical method of setting targets that work. It's called "SMART." It not only helps you realize your vision; it also helps you *avoid* getting involved in fruitless projects. You can set SMART targets about any area of your life—your work attitude, your family life, your sexual intimacy, your learning,



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<sup>1</sup> Much of the literature on SMART planning speaks of *objectives* and *goals*, making objectives the broad vision and goals the specific targets. This is the opposite of what most social sciences mean by objectives and goals—making goals the broad vision and objectives the specific targets. Hence I am using the more readily understood terms vision and targets.

your social skills, your faith, your health, your career path, your friendships, your finances, and so on.<sup>2</sup>

## ***SMART is about Target Statements***

SMART stands for *Specific, Measureable, Aggressive-yet-Achievable, Relevant, and Time-bound*. It represents criteria for a *target statement*. It's good to have a target in mind but better to write it down. Better still to write a statement that meets strict criteria. The effort to *formulate a target in a statement* commits you to very specific actions. And when the statement is fashioned to keep you moving toward realizing your vision, you will less easily be diverted toward other visions, no matter how worthy. You place this statement on the frig, at your desk, on your desktop, or in your planner. Keeping your target statement visible makes reaching it more likely. What do each of these criteria mean?

**Specific:** Your target statement should not be general, like "Lose some weight." Rather it should be something like "I will weigh 120 pounds ..."

Notice that the target *statement* should be an actual achievement, not a wish or a duty. So, instead of "I hope to ...," say "I will ...." Instead of "We must ...," say "We will ...."

Being specific is also important for setting team targets. Everyone should agree on what exactly the target statement means. A team might say, "We will institute the recycling program." But this is overly general. Team members can interpret this differently. (What does *institute* mean? Does this mean we start the advertising? Or have all the wastebaskets labeled?) An example of a specific target statement might include, "... the company will be 95 percent compliant based on a statistically reliable sample."

**Measureable:** Measurable targets include specific events, like "get my diploma;" or something associated with a number, like "weigh 120 pounds." But "do better in school" or "fit into last year's pants" are not measureable.

Sometimes measureable targets regard attitudes, which are more difficult to measure with numbers. In these cases, you need an

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<sup>2</sup> I take this material from Douglas K. Smith's book, *Make Success Measureable: A Mindbook-Workbook for Setting Goals and Taking Action* (New York: John Wiley & Sons, Inc., 1999). You can also find more by browsing the Web under "SMART Goals."

*instrument* to convert attitudes to numbers. For example, suppose your vision is to make dinner time more enjoyable. You might consider a target statement like, "No one leaves the dinner table for at least 30 minutes ..." This will not be a rule you announce but rather a behind-the-scenes way of measuring "enjoyment" at dinner. It's up to you to think of specific ways to entice your family to stick around.

Notice also that numbers are better expressed as end-point achievements than as a percent of change. Suppose your team sets a target, "improve customer satisfaction score by 10 percent." And suppose the current score is 50 out of 100. What is the target? Is it 60 (10 percent more of 100)? Or is it 55 (10 percent more of 50)? Better to just specify the end-point: "raise customer satisfaction score *to* 60."

Likewise, to say "I will lose 10 pounds" can be difficult to measure if you forget your starting weight. Better to say, "I will weigh no more than 170 pounds." The same goes for "We will gain 20 more clients" if you forget how many you have now. Better to say, "We will have at least 200 clients."

**Aggressive yet Achievable.** Have you ever sabotaged your own success? You are not alone. When we commit ourselves to certain objectives, we can get discouraged about the work involved. Or sometimes we can fear that our success will mean that more will be expected of us, so we sidestep looming responsibilities. We postpone marriage, or children. We put off taking a certification test. We neglect the needs of our next door neighbor. We spend years just wishing to be more spiritual.

A SMART target statement can help us actually do what we want to do. There are two A's here because they go together.

Your target should be *Aggressive* because the more comprehensive the achievement, the more problems get solved. Also, an aggressive target forces you to take advantage of opportunities as they arise. It forces you to seek help from others if you need it.

A personal target should still be *Achievable* because you'll get discouraged otherwise. A work team should commit itself to something achievable; if the target is beyond your means, there will be trouble from your leaders.

**Relevant.** Relevant to what? Relevant to your *vision*. Here is where you connect your target directly to your vision. So the target statement should state clearly how it is relevant to your vision, the broad description of what you hope your life and behavior will be like in some not-too-distance future.

People can overlook the connection between a vision and a target: A man may envision getting his poetry published, but what occupies his everyday mind is a host of housekeeping tasks. In plain fact, he already has targets that preoccupy him: having the furnace cleaned, removing a dead tree in the back yard, and painting the bedroom ceiling. He might well set a target of "Send my poem 'Sidewalking' to *Poetry Today* by New Year's Day."

People often set irrelevant targets just to avoid dealing with their real issues: A woman who drinks too much may try to lessen her guilt by setting a target to "pay off my credit card balance by June." She'd more likely gain control of her drinking by writing down, "During the next seven days, I will have only one shot-glass of Scotch a day."

Most importantly, people can set targets but lose motivation because they forgot *why* it's important! So a target statement *must* include the purpose of the target: "... I'm going to exercise for 30 minutes every day *in order to feel better about myself.*" Or, "...I'm going to graduate next May *in order to expand my career opportunities.*" These connect your target to your vision. Also, notice how this part of the statement helps you overcome "success sabotage." It keeps you aware of your fears but determined to overcome them.

**Time-bound.** Targets that last forever are just wishes. To make your target work for you, set an end date. Here are examples that include all five criteria for being SMART:

- "I will weigh no more than 160 pounds *by June 1*, to look my best for Joe's wedding."
- "By *Labor Day*, our average monthly emergency response time (from first call to arrival at site) will drop to at least 25 minutes, as measured by industry standards. This will remind us of the urgency felt by people who call."

- "We will raise customer satisfaction scores for *very satisfied* and *completely satisfied* to 92 percent as reported in the *September Survey*. This is to ensure that our company retains the loyalty of our customers."
- "No one leaves the dinner table for at least 30 minutes during the *first 7 days in January*. This will be evidence that the family appreciates being together more, which is my main concern."
- "Between now and *Christmas*, I'm will exercise for 30 minutes every day in order to feel better about myself and avoid depression."

Did you notice how concise these target statements are? They meet the SMART criteria but omit other factors. This is important because a wordy statement has little impact, while a concise statement makes the point effectively. (If you lie on a bed of nails, you could fall asleep; but lie on one nail and you get the point.)

Notice especially that these criteria do not include anything about *how* you intend to reach your target. This leaves you room for going around unforeseen obstacles and for inventing creative ways to keep on moving ahead. To commit yourself to a *how* is actually a different target. So leave it out of your target statement entirely. Or, if the *how* is important to you, then you have two options: You can add it as a "commentary" in a separate paragraph after the basic SMART target statement. Or you can make a separate SMART target statement about the *how*.

Also, as we said regarding *measurable*, an end-point achievement is more effective than a measure of change. So the time-bound measure is best expressed as an end-point. For example, suppose you write "I will pay off my credit card interest in six months," and seven weeks from now you might read this and realize that you forget when the six months is going to be up. But if you write "I will pay off my credit card by my birthday,..." and especially if you have this target statement taped to your computer monitor, you will be much less likely to forget what you really want to accomplish.

When your deadline arrives, assess your progress. If you didn't succeed, there's no need for discouragement. Failure is normal for people with high hopes. (Show me a man who meets every target and I'll show you a man who's afraid of risk.) Instead, analyze why. Some factors beyond your control may have hindered you. If some factors *within* your control have

hindered you, then set new targets that help you gain control of those factors.

Finally, plan to look at your target statement every day. If the time-to-target is more than a week, after the first few days *rewrite the same target statement* on different colored paper, or in bigger letters. Pay particular attention to the “R” factor—why reaching this target is *Relevant* to the bigger picture of your life. Remind yourself every day of your vision. It keeps you motivated and purpose-driven, rather than just hoping you’ll get lucky.

## ***Setting Informal Targets with Others***

Now, being SMART about targets that are personal depends greatly on having a target statement. However, being SMART about setting targets not need to be quite so formal. Being SMART is also a great way of thinking when you are planning things with others.

For example, when you're talking finances with your spouse, don't just worry together. Make a plan. Even a short-term simple target gives you a sense of control: "By next Sunday, let's decide to cut up one of our credit cards."

Or when you're sitting in a meeting at work, don't let the team leave the room with vague targets. For example, suppose everyone agrees that a better sense of teamwork is needed. Here are some questions you might ask:

- "I'm not sure what 'better sense of teamwork' will look like. Can someone give me an example?" (Specific)
- "How will we know if our team spirit has improved?" (Measureable)
- "Let's reward ourselves for success. How can we measure what that success is?" (Measureable)
- "Is just having popcorn at our meetings the best we can do to improve team spirit?" (Aggressive)
- "I'm concerned that our production target may be unrealistically high. If, halfway through, we see we can't reach it, we'll just lose enthusiasm, and production could end up even worse than last quarter." (Achievable)

- "Why, ultimately, do we want a 'better sense of teamwork'? It will help our motivation if we talk about our vision for the department—the big picture." (Relevant)
- "When will we check to see if we've met our target?" (Time-Bound)

### ***Being SMART About All Targets***

Finally, to take more control over your life, think of the words *goal*, *vision*, *objective*, and *target* as related *only* to this SMART meaning. That is, if your planning doesn't somehow include a SMART target, you're just dreaming. The definitions I present above are for the sake of understanding what makes planning effective. It makes no difference what others mean by these words, as long as you realize that planning should include steps that are specific, measurable, aggressive-yet-achievable, relevant, and time-bound. So when you are making plans with others, if the plans aren't SMART, then speak up. You will help everyone, yourself included, to manage the challenges of life more effectively.