

Goal Analysis

By Dot Young

Introduction

I recently submitted a proposal to a client that included a scheduled meeting time to perform a goal analysis. When we reviewed the proposal, he asked me, “Goal Analysis? Is that really necessary?”

The short answer is a great big **YES**, but I knew he expected more of an answer than that. From his perspective, he knew exactly what the goal was, even if I did not.

Ultimately, I introduced my client to the process of goal analysis with these five simple steps:

1. Write down the goal.
2. List performances that exemplify achievement of that goal.
3. Eliminate “fuzzies” by translating them into performances.
4. Describe performances in complete sentences.
5. Test for completeness.

Why Goal Analysis Is Necessary

I understood his reaction completely.

Until I read [*Goal Analysis: How to Clarify Your Goals So You Can Actually Achieve Them*](#), by Dr. Robert Mager, I had never heard the term “goal analysis,” nor would I have thought to try and complete one. Now, after much use, I will not start a project without one. For me it is the first step in every project.

So what exactly is a goal analysis?

According to Dr. Mager, the function of a goal analysis is to define the undefinable, by identifying the performances that constitute the meaning of the goal.¹ This means defining the goal so that it is tied to specific performance outcomes. Many times, goals regarding performance are vague or abstract. This does not diminish the importance of the goal; however, it does make it much harder to achieve.

Mager uses the term “fuzzy goals” to describe these abstract statements. Let’s look at one example of a “fuzzy goal.”

My client, an Operations Manager for a large retail organization, asked me to develop a training program for 200 retail managers that would improve customer service. In his mind, the goal was straightforward and perfectly clear. For me, not so much, as I had no idea what he meant by “improve customer service.”

Complete a goal analysis to determine the performance outcomes that define success.

Improve in what way? Is there a customer service standard that is not being met? Is there something they should be doing but are not? Does everybody need to improve? How do we measure improved customer service?

These were just a few of my questions. Without knowing what actions a person needs to **do** to be considered successful, any training I develop is hit or miss. Until the performance is defined in a way it can be observed, we can never be sure if we achieved the goal.

So, when goals are fuzzy, we need to complete a goal analysis to determine the performance outcomes needed to define success.

Regardless of the desired performance, you probably hear “fuzzy goal” statements on a regular basis. In fact, you may have even said a few. Things like:

- “I want to lose weight”
- “We need to be more customer-focused”
- “The device must be user-friendly”
- “We need someone who is highly-motivated”
- “They need to be team players”
- “They should own the process”
- “They are not managing the relationship”
- “Develop good communication skills”
- “Have the right attitude”
- “Maintain a healthy lifestyle”

The list goes on and on. Although we may know what those statements mean in general terms, without further definition it is unlikely we can achieve the desired outcome.

This is true for all performance-based goals, whether at work or in your personal life. No matter what the project is – a backyard garden, a new training program, or updates to existing software – a goal analysis helps you determine the actual performances that constitute achievement of the goal.

The Operations Manager was initially resistant to my request for a meeting to complete a goal analysis. I am not sure what he thought, but I got the distinct feeling he thought it was a big waste of time and that I was probably incompetent.

I finally said, “I totally understand why you feel another meeting is unnecessary. If you could just answer a couple of questions for me, we won’t need to schedule a meeting. Sometimes a goal analysis is that easy.”

He was agreeable to that, so I asked him, “What are the actions a person must do that will demonstrate ‘Improved Customer Service’?”

He glanced at me with a somewhat puzzled look and said, “What do you mean? They need to provide superior customer service.” (This is another “fuzzy.”)

To which I replied, “OK, then what actions do they need to do specifically to provide superior customer service? What does superior customer service look like in terms of performance? Is it greeting the customer? Thanking the customer? Offering assistance with a smile? Having fresh products ready and available? What specific behaviors or actions must a person do to provide superior customer service in this environment?”

He was silent for few seconds and then he looked at me with a big smile and said, “I think you’d better schedule a meeting.”

The Five Steps of Goal Analysis

So now we know the purpose of goal analysis and why it is a good idea to perform a goal analysis at the beginning of any project. Next, I will share the five steps that you can use to help ensure your goal is clarified into specific performance outcomes.

As an Instructional Designer, it is my job to develop performance support materials, like training courseware, to meet desired performance goals. Almost 99 percent of the time, this starts off with a generalized, vague statement or a “fuzzy” goal.

There is nothing wrong with these goals, except there is no way to really know if they have been achieved. Mager's five-step process can help you turn fuzzy goals into measurable performance outcomes.

STEP 1: Write Down the Goal

The first step is simply to write down the goal as it exists in current terms. If you are completing this in a group setting, it helps to write the goal on a white board or flipchart. It does not have to be long or complicated or even a complete sentence. For example, your goal could be to "get healthy" or "live a healthier lifestyle."

STEP 2: List Performances That Exemplify Goal Achievement

This is where you list what someone must do or say that represents achievement of the goal. In this step we want to answer the question, "How will I know when I see it?"

During this step, write down everything that comes up. Do not edit or judge statements; that will be done later in the process. The purpose right now is to get everything down that indicates achievement of the goal.

This is often the hardest step, because many times you will get more "fuzzies."

Sometimes, especially at the beginning, it is easier to describe the goal using other vague words. For example, using the goal above of "get healthy," you might get a list of things like "exercise more," "eat right" or "lose weight," as ways to recognize achievement of the goal.

Translate "fuzzies" into observable performance goals.

These are just as fuzzy as the original goal in their current form, but write them down anyway. It is important to write down everything. You can cross items off later, but you cannot cross off items that are not there.

Dr. Mager outlines several strategies for helping define "fuzzies" into observable performance in his book. Here are two that I find particularly helpful:

- If you had a group of people, how would you separate them into two groups: those who achieved the goal and those who had not? How will you tell who has and who has not succeeded?
- Think of a person who has already achieved the goal (or models the desired behavior) and write down all they say or what they do that would cause you to label them as representative of your goal. This works well with goal statements like “provide excellent customer service” or “have a good attitude.”

It is important to realize that if you cannot think of a real person who exemplifies your goal, you may need to re-evaluate the goal, as your expectations may not be realistic.

STEP 3: Sort the List and Eliminate Any Remaining Fuzzies

Once you have a good list generated, you need to go back and review the items and their validity. This is when you will eliminate duplicates and define or eliminate any fuzzy statements.

Go through the list and:

- Place a check mark next to any item that does *not* qualify as a performance.
- Make sure remaining items describe outcomes and not processes. (For example, “make a cake” is an outcome-based statement, whereas “develop cake baking skills” is process-based.)
- For each fuzzy still remaining, write it down as a new goal and start the process again until you have a list of only performances.

In our example “get healthy,” step 1 of this process generated some additional fuzzies: “exercise more,” “eat right” and “lose weight.”

These may be able to be turned into performances by simply adding parameters or measurements.

Some “fuzzies” can be changed into performance goals just by adding parameters or measurements.

“Exercise more” could be rewritten as: “Exercise a minimum of three times per week.”

That might be one of the performances that would show achievement of the goal “get healthy.”

STEP 4: Describe Performances in Complete Sentences

During this step of the process, take each performance that has been identified and write it as a complete sentence. This helps define or fine-tune what you really mean. For example, if our list under “get healthy” had “exercise more,” “lose weight” and “eat more fruits and vegetables” as performances, we could write them as follows:

To achieve the goal “Get Healthy” means to:

- Exercise 45 minutes per session, three sessions per week.
- Lose 10 pounds over the next three months.
- Eat a minimum of three servings of fruits and vegetables every day.

This step helps confirm that all of your performance goals are observable, rather than “fuzzy.”

STEP 5: Test for Completeness

The last step is to test for completeness by asking, “Am I willing to say the goal is achieved if I observe this list of performances?”

If the answer is yes, then you are done with your goal analysis. If the answer is no, then you need to determine what performance is missing or perhaps needs to be defined further. Complete the above steps until you have the performances needed to call the goal achieved.

Conclusion

Goal analysis is an important method for achieving and measuring success when implementing a performance-based improvement, such as a training program. These five simple steps are a great way to get started:

1. Write down the goal.
2. List performances that exemplify achievement of that goal.
3. Eliminate “fuzzies” by translating them into performances.
4. Describe performances in complete sentences.
5. Test for completeness.

For a more in-depth look into this topic, I recommend reading Dr. Robert Mager’s book, [*Goal Analysis: How to Clarify Your Goals So You Can Actually Achieve Them.*](#)

References:

1. Dr. Robert Mager, [*Goal Analysis: How to Clarify Your Goals So You Can Actually Achieve Them*](#), page 11. Atlanta: The Center for Effective Performance, 1997.

About the Author

Dot Young is a freelance Instructional Designer with more than 15 years' experience designing and developing training materials and courseware for a variety of organizations, including for two large multi-unit retail organizations. Prior to this, she was a Human Resource Generalist for over 175 company-operated retail units and also spent time in field operations as a multi-unit manager with twelve locations. She has been certified as an instructor through Achieve Global and is certified in Instructional Design through Langevin and the Center for Performance Improvement.

About Forward Momentum, LLC

Forward Momentum, LLC is a woman-owned small business (WOSB) specializing in project management training/consulting, instructional design services, and custom learning solutions for commercial, government, and non-profit organizations. Since 2000, Forward Momentum has grown to develop, manage, and deliver award-winning Instructor-Led Training (ILT), virtual Instructor-Led Training (vILT), eLearning, and blended learning programs physically on five (5) continents and virtually to all seven (7) continents. Our eLearning is rigorously tested by DHS Certified Trusted Testers for Accessibility and is Section 508 compliant.

To date, we have trained over 40,000 people, including over 6,000 on the Project Management Professional (PMP®) certification exam preparation. We co-developed the innovative blended learning PMP® exam preparation program that earned PMI's Professional Development Product of the Year award in 2007. We are a PM Training Alliance® (PMTA) Certified Training Provider (CTP), and Project Management Institute® (PMI) Global Registered Education Provider (REP).

As a boutique firm, we pride ourselves on our responsiveness and dedication to understanding your business, analyzing your learning and development needs, and driving efficiencies and growth. Visit www.forwardmomentum.net or email dobusiness@forwardmomentum.net to learn how our approach can optimize your learning experience, improve your processes, or empower your team.