



WITH  
POWERPOINT  
DECK

# TEAMS AT WORK

# REACHING OUR TEAM GOALS



**Harvard  
Business  
Review**

# Facilitator's Guide

Use this collection of Harvard Business Review content to help your team connect their goals to specific actions and achieve greater success.

Setting goals for yourself, your team, or an organization isn't just a matter of defining what you're trying to achieve. Research shows that you can make it much more likely that you'll reach these goals if you articulate some specifics about how you'll get there. This is just as true for team initiatives like “develop a budget for the next fiscal year” as it is for personal goals like “gain a better understanding of data analytics.”

This Teams at Work toolkit will help you teach your team techniques that make goals easier to implement, and it will guide you in actively developing a plan with them to achieve the specific goals your team is aiming for right now.

## THIS TEAM SKILLS TOOLKIT PROCEEDS IN THREE PHASES:

- 1. Prework.** 5 min. You'll share the [short video](#) included in this toolkit with your team as an introduction to the concept of goal execution.
- 2. Team presentation and discussion.** 1 hr. You'll host a 60-minute meeting with your staff to present the idea and start applying it to your team's work at hand. All the materials you need to lead this meeting are in this toolkit, culminating in the Meeting Guide, below.
- 3. Follow-up.** 20 min. You'll reiterate the action plan that is the outcome of the activity and provide further resources for team members to use going forward.

### NOTE

This product was designed for use in a team setting. The materials in the attached zip file may be shared freely with your team members without the purchase of any additional license. If multiple facilitators will be using this material with separate teams, please visit [HBR.org](https://www.hbr.org) to purchase additional copies of the product.

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### THE MATERIALS INCLUDED IN THIS TOOLKIT ARE:

0. **Facilitator's Guide** (this document)
1. **Video:** "How Successful People Reach Their Goals," Heidi Grant (about 5 min)
2. **Article:** "Get Your Team to Do What It Says It's Going to Do," Heidi Grant (7pp)
3. **PowerPoint Deck:** "Reaching Our Team Goals," Heidi Grant (28 slides)
4. **Tool:** "A Tool to Help You Reach Your Goals" (Word document, 3pp)
5. **Tool:** "Scripts to Facilitate Productive Meetings" (PDF, 1p)
6. **Email Scripts** (Word document, 1p)

We recommend that you print out this document so that you can complete the checklists for each section and use a physical copy as you lead the discussion.



**WATCH THIS VIDEO  
ONLINE OR OPEN  
THE FILE INCLUDED  
IN THIS TOOLKIT >**

#### TIP

Use this document to easily cut and paste the suggested communications with your team.

# Phase 1

## Prework

**It's best if you can introduce this initiative at a team meeting—in person or in a conference call if your team is geographically dispersed. Explain what they'll be doing as part of this exercise and why it's important. Here is a sample script you can use:**

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Setting goals for yourself or your team isn't just a matter of defining what you're trying to achieve. Research shows that you can make it much more likely that you'll reach these goals if you articulate some specifics about how you'll get there. This is just as true for team initiatives, such as developing a budget for the next fiscal year, as it is for personal goals, such as building a better understanding of data analytics.

I'd like us to take some time over the next two weeks to get better at the critical skill of goal execution. To do that, we'll be using some material from *Harvard Business Review* to learn some new strategies and tactics—and to apply them to some of the goals we're working on today.

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Once you've introduced the idea, share the video by emailing your team [the link](#) (or attaching #1 in the zip file). Cut and paste or modify the following email script to suit your team's needs:

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Hi everyone,

As I mentioned, our team is going to be working on our goal execution over the next few weeks.

I'm going to set up a meeting for us to learn more about this topic, so keep an eye out for an invitation. In the meantime, please watch [this short video](#)—it'll give you a taste of the kinds of things we're going to talk about.

Please let me know if you have any questions.

Thanks,

[Your name]

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### TIPS

You can find this text ready for you to customize, cut, and paste in the document *Sample Emails*.

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Share the video by emailing your team the link or attaching the file included in the toolkit.

## PREWORK

Finally, set up the discussion meeting itself. Ideally, you should hold this one-hour session in person. If that's not possible, set up a conference call using software that also allows for sharing screens so that your participants can follow along with the presentation and the activity. Also make sure that your conferencing system allows for small-group work for discussion (if you have more than 15 participants).

### HAVE YOU:

- Introduced the idea of this initiative to your team?
- Sent the email describing what's coming up, with the video link or file attached?
- Set up a meeting time?
- Planned the logistics for screen sharing and small-group/pair work (if you are holding the meeting virtually)?

## Phase 2

# Meeting with Your Team

### PREPARE FOR THE MEETING

It's important that you also watch the video that you've asked your team to take on. This will help you lead the conversation—and you'll learn from it yourself.

Ideally, you'll read all the other items in the toolkit as well, but if time is tight, focus on the PowerPoint deck, skimming through the notes provided. You can also customize the deck, adding your organization's branding, including material specific to your team's needs, or adding to the talking points.

Next, consider your team's goals—be they formal, annual targets or more informal intentions that you've discussed together. Identify one goal that your team has been struggling to achieve and have it handy for the discussion meeting, during which you'll lead an activity around the goal that will improve your chances of successfully reaching it.

In the days before the discussion meeting, familiarize yourself with the **Meeting Guide** below so that you know what to expect.

Finally, send a reminder to your team to make sure that nobody forgets and is left out of the conversation.

### HAVE YOU:

- Reviewed the materials yourself?
- Selected a team goal on which to focus the group activity?
- Looked over the **Meeting Guide** below so that you know what to expect?
- Sent a reminder to your team that they need to watch the video in advance of the meeting?

# Meeting Guide

Note that the times listed are only estimates. Depending on the size of your group and their individual perspectives, you may take more or less time for each part of the discussion.

## BEGIN THE MEETING—5 MINUTES

Open the meeting by thanking your team for taking the time to watch the video and to participate.

Remind them that this work will help them become better equipped to achieve their goals.

## PRESENTATION—15 MINUTES

Use the slides to present the concept of if-then planning, using the talking points in the notes field.

## GENERAL DISCUSSION—10 MINUTES

Lead a discussion about the concepts. Questions to ask and some suggested answers appear below.

If your team has more than 15 members, have participants break into groups of five or six for this portion of the discussion. If you are using small groups, move from group to group to help prompt the conversation.

- 1. What goals have you set for yourself but experienced trouble achieving? Think New Year's resolutions, professional development goals, fitness goals, or others.**
  - Participants will share their stories.
- 2. What organizational goals has our team struggled to achieve? Are there some goals where we come up short year after year?**
  - Participants will share their perceptions.

### TIP

Note that the times listed are only estimates.

### TIP

For tips on how to lead a discussion, see *Scripts to Facilitate Productive Meetings*.

### 3. Do you think if-then planning could help you achieve some of these goals? Why or why not?

- Participants will share their opinions.

### 4. Are there any types of goals for which if-then planning might be particularly helpful? Not helpful?

- If-then planning can be particularly helpful for general goals like “share information more.” Those kinds of goals are hard to implement because people are entrenched in existing habits and distracted by the work in front of them. If-then planning can help make them more concrete and reveal when the goal should be acted on.
- If-then planning can also be helpful for reducing groupthink. If you want your team to make better decisions, lay out rules of the road in if-then format: “If everyone agrees we should move ahead with a new product idea, then we should still review the P&L together to understand the risks.” “If we are ready to make a decision about a job candidate, then we will review the positive attributes of the other candidates before moving forward with the decision.”
- It can also be helpful for deciding which projects and initiatives to abandon, getting beyond sunk-cost arguments and feelings of affiliation to a project or the team implementing it. “If this project doesn’t yield results by May, then we will take the perspective of a neutral observer who was not responsible for approving the project to begin with.”

### 5. What are some instances when our team has failed to meet a goal because we were striving for perfection instead of adopting a learning mindset?

- In the video, Grant describes the shift in mindset needed to allow yourself to achieve a goal by just trying something rather than perfecting it the first time.

#### TIP

Wear a watch or bring a phone to the meeting. It makes it easier to closely monitor the time and ensure that your group completes the exercise.

#### IF-THEN PLANNING ACTIVITY—30 MINUTES

If you broke the team up for the discussion, bring everyone back together. Ask one team member to use the **Tool to Help You Reach Your Goals** to take notes and record the results from the following activity, projecting their screen to the room and to any remote participants as they go.



### 10 MINUTES:

**Describe the team goal that you've chosen for this exercise.** Ask the team how they would break this goal down into specific subgoals. Capture these on a whiteboard as you brainstorm, then select which three to five subgoals you want to capture in the **Tool to Help You Reach Your Goals**.

- See slide 18 of the PowerPoint deck for examples of specific subgoals.

### 10 MINUTES:

**Ask the team to identify who/when actions for each subgoal.** Again, capture these on the whiteboard as you brainstorm, and then select which ones to capture in the **Tool to Help You Reach Your Goals**.

- See slide 20 for an example of a who/when action.

### 10 MINUTES:

**Ask the team to convert each action to an if-then statement,** capturing these in the **Tool to Help You Reach Your Goals**.

- See slide 22 for an example of an if-then statement.

As the meeting draws to a close, review the if-then statements you've created and encourage the team to use the process on any personal or professional development goals they might have.

## Phase 3

# Follow-Up

**After the meeting, ask your notetaker to send you the **Tool to Help You Reach Your Goals**, completed with your group’s work. Send your if-then statements to the team, along with further resources and a plan to check on progress around the goal you’ve focused on.**

Here is a script to use for your follow-up email:

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Hi everyone,

Thank you again for participating in our program on goal execution. As a reminder, here are the if-then statements that we’ve committed to:

[Cut and paste the list from the **Tool to Help You Reach Your Goals**]

I’ve also attached the PowerPoint deck that we went through, our if-then planning notes, a template that’ll allow you to do some if-then planning on your own, and an HBR article that explains in more detail how if-then planning works and gives some examples of how it’s been used successfully for teams.

We’ll check in about a month from now to see how our if-then plan is working.

Thanks,

[Your name]

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### TIP

You can find this text ready for you to customize, cut, and paste in the document *Sample Emails*.

### ATTACH THE FOLLOWING TO THE EMAIL:

- Article: “Get Your Team to Do What It Says It’s Going to Do”
- PowerPoint deck: “Reaching Our Team Goals”
- The **Tool to Help You Reach Your Goals** completed by your team
- Blank version of the **Tool to Help You Reach Your Goals**

## FOLLOW-UP

Put a reminder in your calendar to check in with the team in about a month. Use an existing team meeting or set up something separate. Has any progress been made toward the goal? Have team members been “triggered” by any of the if-then statements? Do you want to modify the statements in any way?

### HAVE YOU:

- Followed up with the team to send them the notes from the meeting and other resources?
- Put a reminder in your calendar to check in with the team in about a month?

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Product #TWGOA1

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